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ABSTRACT

This proceedings of the 2003 Wilderness Education Association (WEA) conference contains 10 papers and presentation summaries on outdoor leadership, wilderness programs, and related training. Following a brief history of WEA, the entries are: (1) "Adventure Education and Rock 'n Roll: Sustaining the Revolution in Post-Communist Romania" (Dawn M. Buckley, Francois Guilleux, Terry Shirk, Dana Bates, Brandi Bates); (2) "Who Causes More Impact? A Comparison of the User Group Behaviors of Hikers and Mountain Bikers" (Ben Yandeau); (3) Film Presentation: "The Next Industrial Revolution--William McDonough, Michael Braungart, and the Birth of the Sustainable Economy" (Jim Garrett); (4) "The Influence of Selected Wilderness Experience Programs in Changing Participant Attitudes toward Wilderness Purism, Privacy, and Tolerated Encounters (a Pilot Study)" (Mark Simon); (5) "Next Steps in the Certification Movement" (Bruce Martin); (6) "The Paul Petzoldt Trivia Quiz: His Philosophy and Teaching Methods" (Mark Wagstaff); (7) "'When Judgment Is Crucial'--Outward Bound USA's Instructor Judgment Training Curriculum" (Jim Garrett); (8) "Learning Styles: How Do They Affect Us as Outdoor Leaders?" (Marni Goldenberg); (9) "Using the Expedition Leader Style Analysis" (Maurice L. Phipps, Cynthia A. Phipps); and (10) "Walking the Tightrope: Leadership Is a Balancing Act" (Brad Moskowitz). (SV)

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Wilderness Education Association

2003 NATIONAL CONFERENCE ON OUTDOOR LEADERSHIP PROCEEDINGS

January 23-25, 2003

Paul Smith's College
Paul Smith, NY

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Wilderness Education Association

2003 National Conference on Outdoor Leadership Proceedings

Celebrating The Past - Creating Our Future

January 23-25, 2003

Paul Smith's College
Paul Smith, NY

Edited by

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A Brief History OF WEA

The Wilderness Education Association helps people enjoy and protect our nation's most precious resource: our wilderness areas. The WEA has been training and certifying outdoor leaders around the world for nearly 25 years, teaching students safely and effectively lead groups in the outdoors without harming the environment.

In addition, working with national conservation groups and government agencies, the WEA educates the general public in how to appreciate and conserve wildlands through special curricula and public service information campaigns.

Legendary mountaineer Paul K. Petzoldt, Chuck Gregory, Robert Christie, and Dr. Frank Lupton, founded the WEA in 1977. The organization's mission includes "...promoting the professionalism of outdoor leadership and to thereby improve the safety of outdoor trips and to enhance the conservation of the wild outdoors..."

The WEA founders set out to develop an organization which could train outdoor leaders, instill a sense of stewardship the wild outdoors, and provide the skills and knowledge necessary to lead and teach public in the appropriate use of wildness areas. The result is one of the most comprehensive wilderness education and outdoor leadership training organization in the country.

The WEA 18-point curriculum emphasizes experiential teaching in the field with a primary focus on judgment and decision-making. WEA course graduates not only know their abilities, but also learn to respect their limitations.

WEA courses are offered through a network of 30 accredited affiliates around the world. Many WEA courses earn college credit.

Consulting and program development services are an integral part of the WEA mission. Contact the National Office regarding curriculum development, risk management, instructor recruitment, and standards for outdoor leaders.

Format for Submitting Monograph Papers

- A. Title page (center all information on title page)
 - 15 spaces down from top of page:
 - Title of paper (title in "bold print," font:12)
 - 15 spaces down from "Title of paper":
 - Author's name, degree (name, degree in "bold print," font:12)
 - 3 spaces down from "degree"
 - Author's institution
 - Institution address

- B. Body of Paper (Maximum of 10 pages in length, excluding title page and bibliography, APA style)
 - Font: "Times " or "Times Roman"
 - Font size: 12
 - Margin: (left)1.25", (right) 1.25", (top) 1.00", (bottom) 1.00"

- C. Bibliography (APA style, Most recent edition)

Note: Authors may use any part or all their papers for publication. WEA relinquishes ownership of a submitted paper after presentation at the annual conference

Adventure Education and Rock 'n Roll: Sustaining the Revolution in Post-Communist Romania

Dawn M. Buckley, Francois Guilleux, Terry Shirk, Dana Bates and Brandi Bates

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Introduction

For one week at a time, kids come to Straja, a tiny ski "resort" on the southeastern edge of Transylvania, where they live together and participate in outdoor and adventure activities in order to learn positive values as part of a strategy for sustainable development in Romania. Most of the youth live in the Jui Valley, the poorest region in the country. Many of the youth participating in this program live in orphanages. We titled our paper "Adventure Education and Rock 'n Roll" because the theme song of the kids at Viata (the name of the adventure camp meaning "The Life.") was *The Youth of a Nation* sung by P.O.D. The song captures the spirit of these kids growing in an understanding of their responsibility as the leaders of this country. It was evident that hope of future prosperity in Romania was not to be found simply in programs, plans, and money sent from aid organizations, but in a generation of kids learning new ways to think and live. After a week spent together in teams climbing the ropes courses, scaling rock faces, exploring caves and mountains, and doing service projects to clean up the polluted areas, we heard youth from ages 9 to 18 speak articulately of how they were beginning to see the world differently because they had faced these challenges together. They learned that honesty, trust, cooperation, responsibility, and service made challenges easier to tackle and more fun.

Even with all the good that comes from the experience of camp, the fact is, in the Jiu Valley, many needs cannot be met on a ropes course. There is no future for the mines; so, the next generation of youth must develop new vocational skills to survive. In an attempt to address some of these needs The New Horizons Foundation is helping to develop an eco-tourism program that will bring economic life to what experts say is the only future of the valley—tourism.

This paper is the result of a process to set up a WEA affiliate in Romania to help develop Romanian leadership towards long-term civic development in education of youth and eco-tourism. In it we will explain our rationale for the benefits of several Romanian organizations being connected to WEA as well as some of the challenges we faced in running a cross-cultural course. We believe many of the issues we faced will be faced by others as more international WEA affiliates are created.

Background

The idea for a National Standards Program course to be run in Romania was dreamed in February 2002. A group of friends connected through past college experience and work in adventure education saw the potential for the WEA to share its resources with the people of Romania, through the New Horizons Foundation and Viata. New Horizons, founded in 1999, by Dana and Brandi Bates, has the mission of "Developing caring citizens who feel empowered to act on behalf of the common good." Viata is their premier project, a camp program, which takes over 500 youth a summer through a world-class adventure program. They are working closely with the University of Timisoara to make adventure education sustainable in Romania. They have also created an exciting follow-up program to Viata called *Kaizen* — Japanese for "continuous improvement." In addition, they are developing a service learning and a character development curriculum, organizing essay contests, and pursuing other projects that promote positive values as a strategy for sustainable development.

New Horizons is a pioneer in adventure and experiential education in Romania. To develop an adventure and environmental education curriculum, to be used by the University of Timisoara and Retezat National Park, a partnership with the Wilderness Education Association (WEA), Leave No Trace (LNT), and SOLO (Wilderness First Aid) was forged to shape this fledgling initiative. The training was designed primarily for Romanian leaders in the above organizations, and was free of charge to the participants.

Because of its cross-cultural influence, it is believed that adventure education can have a significant impact on aspects of post-communist cultures. Communism systematically bred mistrust and social isolation, as well as a general disregard for ecological practices--which is rooted in the deeper and more pervasive issue of a lack of civic responsibility. Adventure education is well suited to meet these challenges, because the two stated goals of adventure education are (1) development of civic/social virtue and leadership and (2) increased environmental concern. This training was a huge step forward for adventure and environmental education in Romania.

Romania is striving to develop a new generation with broad leadership capacities, good judgment, and effective decision-making processes. This project was focused on these needs. A generation of Communism decimated the leadership capacities of people through the promotion of incompetency and a series of perverse disincentives. At root was a lack of feedback and accountability. After a generation, this resulted in severely reduced critical thought and initiative for individual leadership. It was our hope that the leadership and judgment capacities developed on this training would transfer to all areas of life.

Course Description

The classroom for this course was Retezat National Park, which sits next to the Jui Valley. This valley is a coal-mining region, largely in economic decline, with an unemployment rate of 56%. Surrounding the Jui Valley is the beautiful Retezat National Park and Parang Massif. Both are areas of incredible mountain beauty that, we believe, will face increasing domestic and international use. Regional decision-makers aim to develop adventure and eco-tourism to offset the economic decline of the mining industry.

This can be sustainable ecologically and economically if minimum impact practices are used.

The promise of this project was that these best practices of all the organizations involved would become institutionalized and therefore sustainable through the University of Timisoara (one of the top tier universities in Romania), the Retezat National Park Authority, and the Salvamonts (National Mountain Rescue Organization). The University of Timisoara is the first university to begin an adventure education curriculum as a minor area of study. The Retezat National Park (www.retezat.ro) is Romania's pilot park project and will determine the future of park management systems in all of Romania. The Salvamonts are the "hands-on" practitioners in the field and are largely responsible for the implementation of environmental and safety standards.

There were five program objectives. These included: (1) To share the WEA curriculum and evaluation process and to discuss the curriculum's integration into the participants' programs. (2) To provide an introduction and orientation to the WEA accreditation process and program requirements. (3) To involve the outdoor community in further developing WEA certification for outdoor leadership training. (4) To provide a forum for sharing where professionals can sharpen their individual outdoor leadership skills. (5) To have fun while developing personal and professional relationships.

Cross-Cultural Implications of the 18-Point Curriculum

The first set of challenges we faced can be grouped around teaching. As Americans and mainly English speakers (one of our leadership team was French) we faced an immediate language barrier. Initially we tried to prevent some communications problems by having several key texts and the field journal translated into Romanian before the trip began. This proved to be very helpful, especially when teaching more abstract topics such as leadership and decision-making. Even so, three of the seven Romanian participants spoke very little English and wrote none. The other four students spoke English very well and could translate for us when it was needed. Our approach was to speak slowly and be careful to not use large, uncommon words. We also checked often to see if our communication was clear as well as understood by the students. This proved to be very fun as we learned Romanian expressions that communicated our ideas, and as we all fumbled at times to communicate exactly what we wanted to say.

Cultural norms proved to be a challenge as we realized that some of our basic assumptions about leadership were completely American. The norm for leadership in Romania is a one-way, top-down, authoritarian model coming out of forty years of communist rule. The immense amount of illogical and process-blocking "red tape" and enormous amount of rules for every procedure in civic life and government is continuing evidence of people always being told what to do and how to do it. Even when the process makes no sense at all, and when better ideas were initiated by the people who were directly involved in the project, everyone was required to "follow the rules" because the boss said so. Power and authority were very important to individuals as a means of defining personal status and identity. Certifications and certificates carried a lot of weight even if they lacked substance, larger credibility or were actually purchased with bribes, --which is still common practice in post-communist Romania. These social conventions presented special challenges when teaching topics such as situational

leadership and decision-making as participants had to overcome both the cultural norm that historically de-valued individual initiative and promoted social conformity and unquestioning obedience to a titled leader. Differing vastly from American culture, in Romania, the leader makes the decisions and everyone follows regardless of what they think about it or whether they see a better way to do things. Complaining about strange or ridiculous decisions was allowed by the group, but never addressed to the person "in charge." It became important for us to be sensitive to the conversation happening around camp and bring these topics out in group conversations for analysis and clarification. This was true both of decisions we were making as instructors as well as for the Leaders of the Day.

The second areas of challenge formed around assessment and evaluation. Assessment became very interesting on one level simply because we could not read Romanian and most of the participants could not write well in English. It happened to work out that three participants could write well in both English and Romanian; so they became translators for us. One of the translators was in a small learning group with two other people to help communicate accurately what was written. Instead of collecting journal entries for instructors to read, we scheduled oral feedback sessions where participants would read their entries to us. Following this, a discussion would ensue that allowed the instructors to ask participants about their reflective entries. In cases with participants who spoke very little English, a translator would sit-in on the feedback session to translate the journal, written in Romanian, and would then help with spoken responses. It took an entire day to give feedback to the nine participants on the course (we did this several times throughout the trip). Mid-course and final evaluations took even longer as we had to go through each of the 18-points and hear the participant-to-participant feedback. Our time frame for the entire trip needed to be continually adjusted due to such lengthy communication procedures.

Besides difficulties associated with communication, there were again assumptions about feedback that took us by surprise. As we tried to understand why no critical feedback was ever given, we came to understand that critique was seen very differently in Romania than it is seen in America. Having a "bad mark" on an evaluation was equivalent to having a huge black mark on your person. We learned that in job evaluations the notion of... "You scratch my back and I'll scratch yours," was very typical of Romanian Bureaucracy. In other words, I give my boss exemplary marks so that later I will receive them back. To give negative (even constructive) feedback of any kind was asking for bad things in return. Our understanding that feedback helps a person learn, grow, improve, was foreign and difficult for the participants to believe. In an attempt to alleviate the fear, anxiety, and seeming injustice of such an evaluative system as mid-course and final evaluations used by the WEA, we tried to reframe the actual tool so it was more of a comparison of where a person began in his or her knowledge to the place they had moved or grown in skill and knowledge. Initially we thought this worked well, but realized at the end of our final evaluations that the amount of quality feedback was still very minimal. This is certainly an area for more study before using the process again. We think that it would be necessary to begin teaching feedback and evaluation skills from the very beginning of the course, practicing them and doing exercises all the

way through to help participants feel comfortable communicating in this way. There may also be other options for gathering and giving feedback of which we are not aware.

Conclusions

Romania is a country of incredible beauty and promise. Yet, with present environmental standards, the wilderness areas can sustain no more than a few visitors each year. By bringing to bear the standards of WEA, LNT and SOLO, the dream of sustainable wilderness usage will be realized. This project brought some of the highest standards of excellence into the habits of outdoor users and institutions. It also contributed to the leadership capacities of the participants.

The interdependence of all the issues of civic participation, economic development, and ecological awareness were directly or indirectly touched upon by this project. Indeed, in a situation like Romania's, many argue that the most effective way to improve the environment is simply to improve civic participation—for at this level of development in transitional economies, improving the environment and improving civic participation are integrally connected.

Through Viata, The University of Timisoara, Retezat National Park, and The Salvamonts, the participants on this NSP course will pass on their knowledge to 500 youth per summer, several classes of students at the university each semester, and hundreds of tourists each year teaching these environmental practices and furthering the program's larger strategy of civic development. This creates a loop whereby the contributions of civic engagement benefit the environment and vice versa.

The bottom line is that this project contributed directly to ecologically-sound environmental practices, to the improvement of leadership and judgment capacities, and to the development of adventure education in Romania. These in turn will contribute substantially to sustainable development in this country.

Who Causes More Impact? A Comparison of the User Group Behaviors of Hikers and Mountain Bikers.

Ben Yandeau
SUNY Potsdam

Introduction

This study was part of a service-learning project within the Wilderness Education Program at SUNY Potsdam. The study was conducted at Stone Valley, a Cooperative Recreation area located in Colton, New York. This area has experienced increased use by many different user groups, such as hikers and mountain bikers. The experiment was created for two reasons; first, to illustrate how quickly a previously non-impacted area can become a trail, and second, to determine which user group, either hikers or mountain bikers create more initial damage to the forest floor.

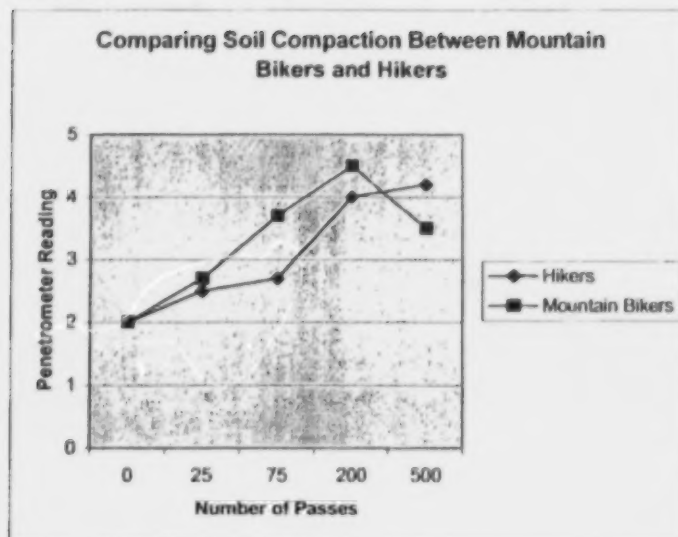
Methods

Methods established by Eden Thurston (2002), a student at the University of Guelph in Ontario were used as the basis for this project. The experiment was set up in a maple forest containing fine sandy-loam soil. The terrain included slopes ranging between 10-20 degrees. Three plots were selected, each 1m wide by 4m long. One plot was for designated for the measurement of hiker impact, one plot was designated the measurement of mountain bike impact and the third was designated as a control area that remained un-trampled. Passes were then made by either hikers or mountain bikers in a down hill direction across the two plots in the following increments 0, 25, 75, 200, 500 passes. In between each increment, penetrometer readings (soil compaction) and trail depth were measured and recorded at 0m, 2m and 4m distances within each plot. Impact depth was measured in centimeters by pulling a string, held taught, across the surface of the trail. The distance between the string and the depth of tread impact was then measured.

Results

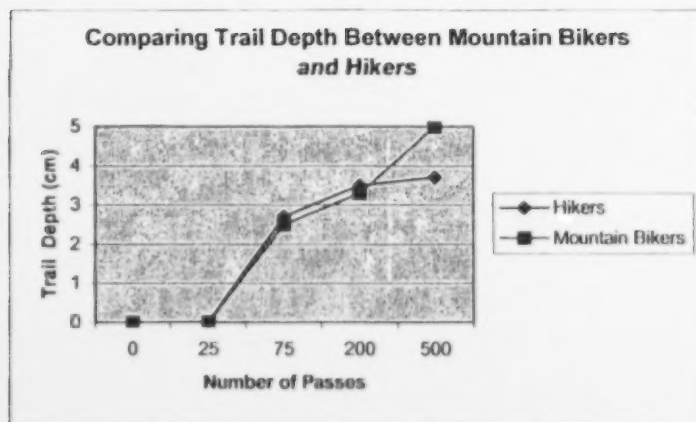
The differences between the user impact groups, on either trail depth or soil compaction, were insignificant. At 25 passes the penetrometer reading was 2.5 for hikers while it was 2.7 for bikers (refer to figure one).

Figure 1.



Trail depth for both user groups at 25 passes was still at 0. After 75 passes, however, the trail depth increased to 2.5 for bikers and 2.7 for hikers (See Figure 2). This statistic indicates that the bikers actually impacted less at this point. As described by Gordon Cessford (1995) in an in-depth study of this topic entitled "Off-Road Impacts of Mountain Bikes, Physical Impacts" he states, "...impacts from the normal rolling effects of wheels would likely be less than those of foot steps."

Figure 2.



Throughout the experiment trends in the data continued to support these use/impact patterns with one exception. It was observed that as the terrain became steep, the application of brakes in the mountain bike user group led to an increase in trail depth and an increase in trail softness. This phenomenon was described by Keller and Cessfords (1995), they stated, "...down hill mountain bike travel has the greatest potential for environmental impact to the trail (caused by skidding and poorly executed braking). The hikers at the end of the plot were also experiencing a much deeper trail than the beginning, however, the penetrometer readers were also getting higher.

Discussion

Though the differences were insignificant, it is noteworthy that the mountain bikers created the most damage during this study due to the application of their brakes. Toward the end of the plot, as the terrain became steep, the riders had to slow the bike in order to make a turn outside of the plot. Many of the riders were inexperienced and skidded to a stop at this point. Poor braking skills were the reason for decreasing penetrometer measures and an increase in trail depth. Where better braking skills were practiced, further up in the plot, the penetrometer and trail depth readings were very similar to that of hiking.

If we were to apply these factors to an already established trail, the impacts would be very low. An experienced rider, with good breaking habits would likely not create noticeable impact. In contrast, the rider with poor breaking habits would be more inclined to create a noticeable mark on the trail. How much effect the variable of rider skill has on a well-impacted, heavily used trail is still unknown.

Toward the end of the hiking plot the penetrometer readings increased a great deal from those measured higher. Like the plot for mountain biking the hiking plot also became steeper toward the end. Also, at the end of the plot, hikers were forced to make a sharp turn. At this turning point the trail depth and impaction were much more severe than elsewhere on the trail. These findings suggest that on steep terrain hikers may cause significant damage to soil and vegetation compared to flat terrain.

Conclusion

The results of this study suggest that the impacts of hikers and mountain bikers to soil and vegetation do not significantly differ between user groups. Nevertheless, it is noteworthy that damage to the terrain did occur and in both instances, user behavior led to measurable changes in soil quality and trail depth early in this experiment. Through observing differences in soil compaction and trail depth between the two user groups, it is apparent that the majority of damage occurs in the early stages of trampling. If we take that information and apply it to the user groups studied, one can see where problems may arise. When terrain becomes undesirable (muddy) or too difficult, the user will be inclined to deviate from the established trail. If we observe the graphs one can infer that in this case the mountain biker, when he or she chooses an alternative route will cause more damage than a hiker on steep terrain where braking (and skidding the tires) becomes necessary to keep the bike under control.

With that said, it is difficult to distinguish which user group will likely do more damage to trail systems. At Stone Valley however, there are sections of trail, which contain steep staircases. Riders often bypass these areas more so than hikers creating erosion close to the existing staircases. In the end, comparing the impact of hikers versus bikers is a complex and touchy issue. User behavior appears to have much more to do with how much impact occurs to the resource than user groups. The main message gleaned from this study is that impact to soil and vegetation occurs quickly. Stay on the trail!

Sources Cited:

- Cessford, G. (1995, October 23). *Physical Impacts – Mountain Bikes. Off-Road Impacts of Mountain Bikes*, Retrieved September 17, 2002 from the World Wide Web: <http://www.mbosc.org/Impacts/physical.html>
- Thurston, E. (2002) *Impact study*, Retrieved September 17, 2002 from the World Wide Web: <http://www.cic.envsci.uoguelph.ca/>

Film Presentation: "The Next Industrial Revolution –William McDonough, Michael Braungart, and the Birth of the Sustainable Economy."

Jim Garret, M.A.T.
Outward Bound USA

Introductions

"Can This Man Save the Planet?" This was the question asked on the cover of the Dartmouth Alumni Magazine, Sept./Oct. 2002, to introduce an article about the work of architect William McDonough.

"While some environmental observers predict doomsday scenarios in which a rapidly increasing human population is forced to compete for ever scarcer natural resources, Bill McDonough sees a more exciting and hopeful future. In his vision, humanity takes nature itself as our guide, reinventing technical enterprises to be as safe and ever-renewing as natural processes. Can't happen? It's already happening, and it's part of what architect McDonough and his partner chemist Michael Braungart call The Next Industrial Revolution." --*Shelly Morhaim*

McDonough has earned international acclaim for his work of designing major buildings for corporations and colleges (The Gap, Ford Motor Co., Herman Miller, DesignTex, Oberlin, etc.) that both "work with nature *and* enhance profitability." Naming him a "Hero for the Planet," Time Magazine said: "His utopianism is grounded in a unified philosophy that – in demonstrable and practical ways – is changing the design of the world."

Presenter's Reflections

My reason for presenting at WEA 2003 the video which describes the seminal work of American architect McDonough and German chemist Braungart should by now be obvious: the increasing impact of our industrialized, consumer economy on the natural environment is leading to a decrease in the places in that environment which we can still describe as "natural." As professionals who depend on wilderness for our work, as well as our pleasure, we care deeply about the quantity and quality of the natural areas through which we travel.

Filmmaker Shelley Morhaim's portrayal of the thoughts and practices of the McDonough-Braungart design team, produced by Earhome Productions and narrated by actress Susan Sarandon, gives us a strikingly encouraging view of how the "built environment" – that which humans design and construct on the land – can be made to be sustainable, and, in fact, made to improve rather than despoil the naturalness of the world. McDonough and Braungart have proved to their clients that inspired design can benefit both the biosphere and the bottom line.

Key Concepts

What follows is a selection of Bill McDonough's provocative ideas, as presented in the Dartmouth Alumni Magazine, Sept./Oct. 2002; in "Enough!" – the Newsletter of

The center for a New American Dream (Vol.1, No.4, Spring 1998); and in publications of Earthome productions.

- "...To live within the laws of nature means to express our human intention as an interdependent species, aware and grateful that we are at the mercy of sacred forces larger than ourselves, and that we obey these laws in order to honor the sacred in each other and in all things." –WMcD
- "Growth is good; ask a tree. A kid grows; that's good. So the argument in commerce about growth and no growth is a stupid argument. Of course you have to grow; nature wants you to grow and businesses want to grow, but if businesses have to grow and environmentalists come along and say your growth is ruining the earth, that's because the growth is not following nature's laws. But what if growth were good? What if that factory purifies water and makes oxygen? That's interesting. And different from 'I want less bad versions of what we already have.'" –WMcD
- "We accept the world the way it is and resolve to be less bad. Global warming? Drive a hybrid vehicle, and you're being less bad. But you're still producing global warming—just not as much of it. Being less bad is not being good. If you're supposed to be driving to Canada and you find yourself headed towards Mexico, it's not going to help if you slow down to 20." --WMcD
- Not long after his graduation from Dartmouth, and before going to architecture school at Yale, McDonough signed on to assist a design team working to develop a long-range plan for housing in the country of Jordan. McDonough remembers (*Dartmouth Alumni Magazine*, Sept./Oct. 2002, p.27):

"In Jordan I was sitting in a Bedouin tent, and instead of saying, 'Oh, my God, I've gone back centuries to some primitive ways,' I saw it as one of the most elegant structures I've ever seen. You've got your factory—goats—following you around and eating what you can't eat and making hair out of that for you. At the same time it gives you meat, milk, and entertainment. And then rejuvenates the soil with its droppings—a full cycle. So it's a solar energy transformation.

"So you take solar income and turn it into goat hair, and turn that into a very rough weave. Now you're in 120-degree heat and there's no wind, there's no shade. And guess what? You're sitting in the tent and saying, 'Hey, I'm sitting in deep shade, and the temperature is 95 degrees; that's interesting.' And the design of the tent through congestion creates a breeze. Now you're in a cool breeze, and the lightning is exquisite because the tent lets in a thousand pin-holes of light. It's magnificent.

So we're going to solve the energy problem because we have solar income. But we're not going to solve the mass [fossil fuel] problem because we don't have mass income—the occasional meteorite? The mass of the earth is getting toxified, the soil is getting depleted, and we're cutting down rain forests and

losing genetic information. The energy is not the problem, it's the mass. We'll figure out energy because we have the solar income. You can do it."

- "The next industrial revolution calls us to dematerialize—we start to think more in terms of information and less in terms of stuff." –WMcD

William McDonough's Guiding principles:

WASTE = FOOD
USE CURRENT SOLAR INCOME
RESPECT DIVERSITY

- "If we understand that design leads to manifestation of human intention, and if what we make with our hands is to be sacred and honor the Earth that gives us life, then the things that we make must not only rise from the ground, but return to it—soil to soil, water to water—so everything that is received from the Earth can be freely given back without causing harm to any living system. This is ecology. This is good design."

–WMcD

Links to find out more about McDonough's and Braungart's Work:

"The Next Industrial Revolution," article by William McDonough and Michael Braungart in The Atlantic Monthly, October, 1998:

www.theatlantic.com/issues/98oct/industry.htm

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EPEA, Dr. Michael Braungart, founder and managing director www.epea.com

Dr. Michael Braungart www.braungart.com

DesignTex/Rohner's Climatex Lifecycle fabric www.climatex.com

Oberlin's Adam Lewis Center www.oberlin.edu/newserv/esc/Default.html

The Center for a New American Dream www.newdream.org

Earthome www.earthome.org

For more information about the film, see the website: <thenextindustrialrevolution.org>.

**The Influence of Selected Wilderness Experience Programs in Changing Participant Attitudes toward Wilderness Purism, Privacy, and Tolerated Encounters.
(a pilot study)**

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Introduction

The 1964 Wilderness Act was legislated to protect and maintain a portion of the nation's remaining wild areas as they were during pre-settlement times. In part, the intent of this legislation was to provide the opportunity for primitive forms of recreation in surroundings where wilderness can be experienced on its own terms. However, many wilderness users do not experience wilderness as it is described in the Wilderness Act. Overuse and related resource degradation have resulted in the loss of the primeval character of many wilderness areas that most recreationists frequent. This is not meant to imply that the majority the 105 million acres of wilderness in the national wilderness preservation system are highly impacted through recreational use; wilderness hiking and camping tends to be concentrated along high-use corridors that often lead to popular destinations (Hammitt & Rutlin, 1995). Indeed, the vast majority of wilderness use is day-use and confined to trips generally lasting no more than two days (Hendee & Dawson, 2002).

Within these high-use corridors, encounters with others may be frequent, assumed by some researchers (e.g., Watson, 1995) to decrease the opportunity for solitude. Solitude is specifically mentioned in the wilderness act as a critical component of wilderness. Regardless, wilderness users who frequent these areas report high satisfaction levels and achieved solitude despite crowding and the related resource degradation (Manning, 1999; Hammitt & Rutlin, 1997).

Theoretically, the optimal number of encounters for wilderness backpacking among wilderness users would be zero encounters (Shelby, Vaske & Donnelly, 1996). Normative theory suggests that wilderness users, as a group, share norms (such as encounters) that dictate expectations for social behavior and ecological impacts in wilderness. As intuitively appealing as this suggestion is, results of empirical studies challenge its general veracity. Hall & Shelby (1996) found that many wilderness users appear to lack norms that dictate acceptable social and ecological conditions in wilderness settings.

Contrary to the past research, there are wilderness users (labeled *purists*), who hold values that are consistent with the wilderness act. Purists place high value on solitude and tolerate fewer encounters. A purism scale was developed to objectively judge which constituency of wilderness users should be considered during the wilderness management planning process. The intent of the Purism Scale was to identify individuals whose attitudes aligned with the 1964 Wilderness Act (e.g., purists). Once individuals were identified who held purist attitudes (via the Purism Scale) the intent was to use their input in the planning process to help to define baseline conditions for managing wilderness recreation experiences.

Wilderness purists are more sensitive to crowding and its associated impacts than other wilderness users (Shelby & Shindler, 1992; Shindler & Shelby, 1993). Solitude is an important sub-dimension of the Purism Scale because concern for solitude should be strongly associated with perceptions of crowding; that is, those who are highly concerned about solitude should be very sensitive to crowding. Scales have been developed to measure solitude, but research in this area is still not well refined (Watson, 1995). For example, the Purism Scale (Shafer & Hammitt, 1995) measures solitude primarily as a function of spatial relationships (i.e., solitude as the opposite of crowding). The psychological meaning(s) that solitude has for the individual have also been investigated under the broader concept of privacy, which is comprised of the following domains: cognitive dimensions, solitude, intimacy, anonymity, and reserve (Hammitt, 1982). This multidimensional construct (of privacy) is associated with both a place and a state of freedom where one can choose one's level of interaction with others. The Privacy Scale was included in this study as measure of solitude in addition to the solitude dimension of the Purism Scale.

It is not clear how purist attitudes come about--whether purists are attracted to these sub-groups or if purism results from participation in these groups. Can purist attitudes toward resource conditions be acquired as a result of experience, wilderness or otherwise, or are those who already possess purist attitudes simply attracted to sub-groups that share similar concerns? Implicit in the philosophies of most wilderness experience programs (WEPs) is that exposure to wilderness conditions and wilderness instruction indeed does affect the participant's attitudes towards wilderness.

WEPs have been documented to have profound and lasting influences on people's lives (Ewert & McAvoy, 2000); information and education are thought to be the most effective means for influencing change in wilderness user attitudes and behaviors (Hendee & Dawson, 2002). It is reasonable to assume, therefore, that WEPs which focus on minimum impact camping skills and environmental ethics may influence how participants perceive social and ecological impacts to wilderness.

This pilot study focused on two broad questions. First, do purism, privacy, and tolerated encounters change significantly for participants in WEPs? Second, do WEPs facilitate a coherent relationship between solitude and the number of encounters participants will tolerate and still consider their experience a *wilderness* experience? Before the field experience, participant attitudes toward solitude and crowding may not be coherent (i.e. there is no relationship between concern for solitude and encounters with others). However, following the field experience it was hypothesized that there would be a strong and coherent relationship between concern for solitude and encounters with others.

Methods

This exploratory pilot study was conducted as a two-group pre-test/post-test quasi-experimental design. Two clusters were used as a convenience sample of WEP groups. Both clusters shared the same treatments; wilderness education that involved field time in a wilderness area or an area that closely resembled the attributes of wilderness. Cluster one contained participants who were enrolled in a short-term (2-3 days) backpacking course at a northeastern liberal arts college, culminating in a weekend backpacking trip. Cluster two contained long-term (10+continuous days) wilderness

education programs. All long-term groups sampled were Wilderness Education Association Affiliates with the exception of a group from Minnesota.

The two cluster groups formed the basis for comparison between groups. For instance, pre-tests were compared to determine if there was a difference between groups prior to the field experience. The post-test was administered immediately following the course to assess the influences that the course had on participants. The survey was implemented between May 2002 and November 2002. A total of 212 usable surveys were analyzed; 106 pre and post tests. Of the surveys analyzed, 42 (39.6%) participated in a Short Term WEP and 64 (60.4%) participated in a Long Term WEP.

Preliminary Data Analysis

Preliminary analysis of the data was conducted to determine the reliability of Purism and Privacy subscales. According to Dawson and Hammitt (1996), Cronbach Alpha's of .60 or higher is considered acceptable for inclusion as a dimension in the scale. Below, Table 1 outlines the subscales and their respective Cronbach Alpha's. Cronbach Alpha's for each of the subscales from two previous studies (Dawson & Hammitt, 1996 and Shafer & Hammit, 1995) are included for comparison.

Table 1.
Privacy and Purism Subscale Reliability

Scale and sub-dimensions	Cronbach's Alpha WEP Pilot Study	Cronbach's Alpha Established Scales
<u>Privacy</u>		Dawson & Hammitt (1996)
Natural Environment	.93	.79
Cognitive Freedom	.86	.82
Intimacy	.87	.78
Individualism	.71	.79
<u>Purism</u>		Shafer & Hammitt (1995)
Human Impact	.92	.81
Natural Features	.82	.82
Solitude	.90	.87
Management Confinement	.64	.75
Primitive Travel	.89	.68
Management Aided Travel	.87	.73

Next, a series of separate regression equations were conducted to determine if the Privacy scale and/or the solitude dimension of the Purism Scales served as a predictor of the dependent variable (DV) Tolerated Encounters. Tolerated Encounters were reported in three locations, at the campsite, trail, and trailhead. The preliminary analysis revealed that Privacy did not significantly contribute to the linear relationship between Tolerated Encounters at the campsite, trail, or the trailhead locations. Therefore, the Privacy Scale was excluded from further analysis. However, a significant relationship was found

between the Solitude dimension of the Purism Scale and Tolerated Encounters, therefore, this subscale served as the independent variable (IV) for further analysis.

Following each bivariate linear regression analysis, a multiple regression analysis was conducted to determine the influence Experience Use History (EUH) had on the linear relationship between Solitude (IV) and Tolerated Encounters (DV). Experience Use History was measured in this analysis as a single item on the questionnaire--the longest time spent on a single trip. The preliminary analysis revealed that EUH did not significantly contribute to any of the linear relationship between Tolerated Encounters at the campsite, trail, or the trailhead locations. Therefore, EUH was excluded from further analysis.

Data Analysis

The first analysis examined pre-test Tolerated Encounters at the campsite as predicted by Solitude. According to this analysis, .11% ($R^2 = .11$) of the variability within Tolerated Encounters at the campsite was explained by the level of Solitude. However, these results were not significant at the .05 level, meaning there is no relationship between the level of Solitude and the number of encounters tolerated at the campsite for participants prior to a WEP. Additional preliminary analysis of pre-test data revealed that in addition to campsite encounters, Tolerated Encounters at the trail or the trailhead locations were not significantly related to levels of Solitude.

The next series of analyses examined post-test Tolerated Encounters (TE) at the campsite, along the trail and at the trailhead as predicted by Solitude ($n = 20$). Figures 1, 2 and 3 below, provide a graphic display of the scatter plots.

Figure 1.

**Max Tolerated Encounters at Campsite as Predicted by
Concern for Solitude (Purism Scale)
(Post-Test)**

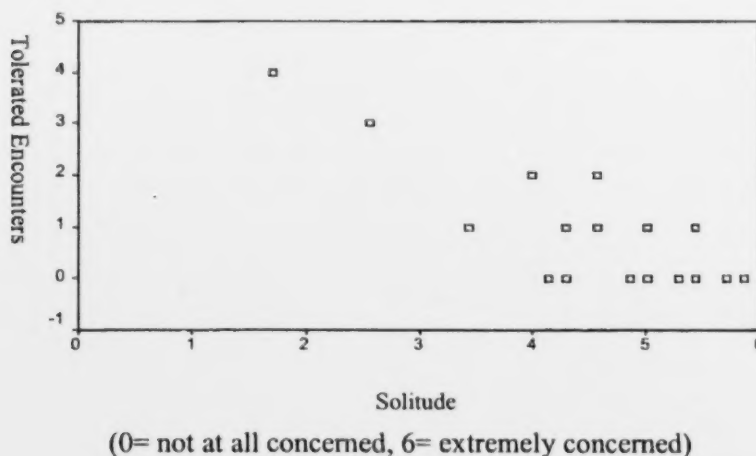


Figure 2.

**Max Tolerated Encounters along Trail as Predicted by
Concern for Solitude (Purism Scale)**
(Post-Test)

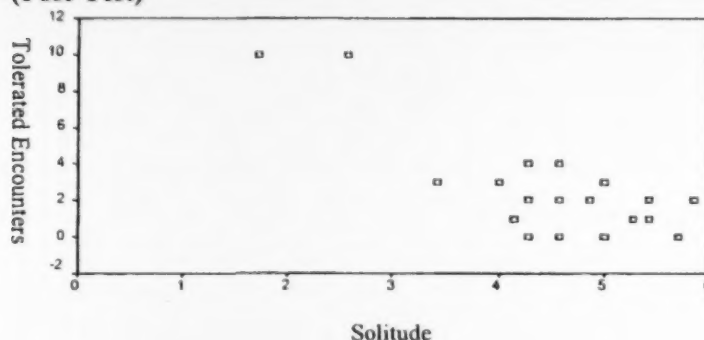
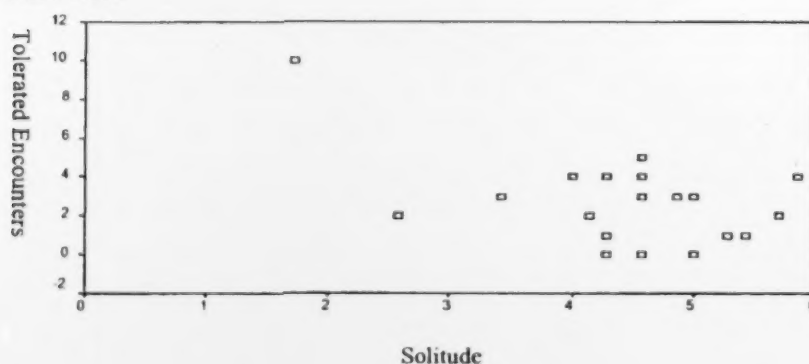


Figure 3.

**Max Tolerated Encounters at Trailhead as Predicted by
Concern for Solitude (Purism Scale)**
Post-Test



In addition to scatter plots, regression analysis examined post-test Tolerated Encounters (TE) at the campsite, along the trail, and at the trailhead as predicted by Solitude ($n = 20$). According to this regression analysis, 62% ($R^2 = .62$) of the variability in TE *at the campsite* was explained by the level of Solitude. These results are significant at the .001 level. The next regression analysis examined TE *along the trail* as predicted by Solitude. According to this analysis, 64% ($R^2 = .64$) of the variability TE *at the campsite* is explained by the level of Solitude, significant at the .001 level. The final regression analysis of this pilot data applied a regression model to examine TE *at the trailhead* as predicted by Solitude. According to this analysis, 29%

($R^2 = .286$) of the variability TE at the campsite is explained by the level of solitude, once again significant at the .001 level. Table 2 below, provides summary of the results.

Table 2.
Regression Analysis with Solitude as Independent Variable

Dependent Variable	R^2
Pre-test Tolerated Encounters at Campsite	.114
Post-test Tolerated Encounters at Campsite	.628**
Post-test Tolerated Encounters along the Trail	.640**
Post-test Tolerated Encounters at the Trailhead	.286*

* $p < .05$ ** $p < .001$

Between Groups Analysis

The next series of analysis were conducted to determine if the field experience (treatment) affected the short-term and long-term groups differently. The first comparison examined mean solitude scores between short-term and long-term groups. Solitude was measured as the mean of the solitude dimension of the Purism scale (Shafer and Hammitt, 1995) and consists of the items listed in table 3.

Table 3.
Solitude Measured as the Solitude Dimension of the Purism Scale

The amount of solitude your group experiences
The amount of noise heard in the area that comes from other wilderness visitors
The distance between your campsites and the campsites of others in the area
The number of groups that pass within sight of your camp
The total amount of time that your party has in the area without seeing or hearing anyone else
The number of vehicles you see at a trailhead
The number of groups you pass during the day while traveling

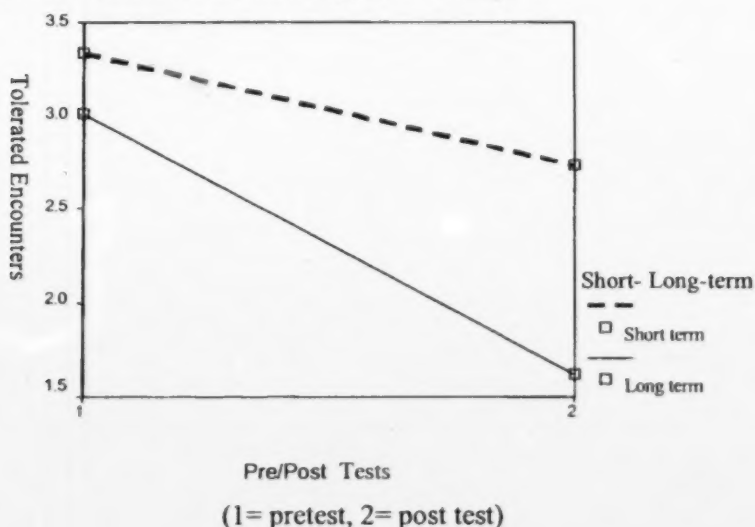
An ANOVA was conducted to determine if there were significant differences within subjects (pre/post within the same group) and between subjects (short-term/long-term comparison between groups). According to this analysis, there were no significant pre/post differences between group mean solitude scores.

A second ANOVA was conducted to determine if there were significant differences within subjects (pre/post) and between subjects (short-term /long-term) in the mean number of Tolerated Encounters. Figure 4 provides a graphic display of this comparison.

Figure 4.

Comparison of Mean Tolerated Encounters

Between Short-term and Long-term Groups



According to this analysis, there were significant pre/post differences within groups ($p = .023$) in the number in the mean Tolerated Encounters. The above graph is also highly suggestive that the long-term group experienced more change than the short-term group, however the between group pre/post results were not significant at the .05 level.

Discussion

Results of the Cronbach Alpha's analysis of the Purism and Privacy subscales suggest that the reliability levels are comparable to previously published studies (e.g., Dawson & Hammitt, 1996; Shafer & Hammitt, 1995). These results suggest that the scales, as they exist on the pilot survey, exhibit acceptable levels of reliability. Comparisons between short-term and long-term groups did not yield significant change in Purism, Privacy and Tolerated Encounter scores. However, the results are highly suggestive that there are significant differences between the amount of change in Tolerated Encounters following participation in a WEP (see figure 1.4). Not all

participants indicated a numeric value for Tolerated Encounters, which resulted in a small sample size for this comparison (short-term $n=10$, long-term $n=30$). More data is necessary to determine if there is a significant difference between long term and short term Wilderness Education Programs in regards to Tolerated Encounters.

Pretest data did not exhibit a coherent relationship between participant concern for solitude and the number of encounters participants would tolerate and still consider their trip a *wilderness* experience. These findings are consistent with past studies (e.g., Hollenhorst, Frank & Watson, 1994; Patterson & Hammitt, 1990). However, post-test data indicated that following a field experience, participant concern for solitude was significantly related to encounters with others in wilderness among course participants.

These results suggest that the field experience influences participants to become a more educated user constituency. One could surmise that these participants have a strong working understanding of where their preferences for management fit in terms of type of experience they seek. If those who score as Purists (on the solitude dimension of the Purism Scale) support and seek low-density wilderness recreation experiences, and in contrast, those who are non-purists seek and support more developed backcountry experiences, recreation users will seek and support experiences that are consistent with the legislative intent of how the resource should be managed.

Conclusion

The lack of a coherent relationship found in past research between concern for solitude and perceptions of crowding has created a dilemma for wilderness managers who are legally-mandated to manage wilderness for solitude. In many instances, groups that consider themselves wilderness advocates will not support use limits in wilderness areas when managers are concerned about over-use (Cole, 2001). In fact, some user groups have gone as far as to challenge management plans that call for limiting use on the basis that past research has not demonstrated a clear and consistent relationship between concern for solitude and perceptions of crowding (Zion Canyoneering Coalition, 2003).

The findings of this study reveal partial support for the contention that WEPs emphasizing wilderness education effectively influence course participants to become a more educated wildland user constituency. Specifically, WEP participants have attitudes and expectations toward the resource that are consistent with the legislative intent of the Wilderness Act. This is an important finding because, according to this research, WEPs *do* influence purist attitudes within participants and these programs will help to change the overall response of wilderness users to changing wilderness conditions. For instance, those who place a high value on solitude and are sensitive to crowding may avoid wilderness areas that are over used. In addition, they may also be inclined to support use limits and other measures proposed by wilderness managers to protect the resource. These issues are especially relevant today because the numbers of WEPs are dramatically increasing and managers and educators question whether or not these programs are a blessing or a bane for wilderness management (Friese, Hendee & Kinziger, 1998, Gager, 1998). More data and additional analysis will be necessary to further examine the relationships suggested by this study.

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Next Steps in the Certification Movement

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In July 2000, I was invited to serve as Assistant Professor of Outdoor Leadership at Sheldon Jackson College in Sitka, Alaska. The position was a newly created one, and my initial responsibility in the position was to develop a baccalaureate degree program in Outdoor Leadership. Sheldon Jackson College was undergoing a transformation in its mission and in the nature of its academic programs at the time. One programmatic area that was noticeably absent from a school located in the heart of one of the most magnificent wilderness areas in the world was adventure programming. The school decided to embrace the potential of such a program, thus my charge.

One of my primary challenges in developing the program was to determine the basic professional criteria, the basic professional requirements, for practitioners in the field of Outdoor Leadership. What are the skills and competencies that students graduating from such a program will need to be considered competent practitioners in the field of Outdoor Leadership? And, how can I be certain of the validity of the criteria and training that I provide to students at Sheldon Jackson College? I looked to two primary sources in determining criteria for competence as practitioners in the field. First, I looked to other colleges and universities around the country offering degree programs in the area of outdoor education and recreation. I completed a survey of about 15 other programs around the country to gauge the requirements that they considered important for entry into the field. These requirements were presented primarily in terms of coursework (i.e., study in particular subject areas) that comprised each of these programs. Second, I looked to the Wilderness Education Association (WEA) and its National Standards Program (NSP) as a basis for determining requirements for entry into the field. I eventually developed a curriculum that reflected the WEA's 18-point curriculum. A capstone experience in the program is participation in a WEA NSP course. Students who complete the degree program in outdoor leadership, along with their college diploma, receive the WEA's Outdoor Leadership certification. This certification, and affiliation with the WEA, was important to me as I developed the degree program primarily for the legitimacy that it offered the program. It was important because of the legitimacy that it offered the educational credentials of students completing the program.

Despite this value, I was still unsettled. While an affiliation with WEA offered my program and students a greater level of legitimacy, I was concerned with the legitimacy of the WEA itself. I was concerned with the legitimacy of WEA's attempts at offering a nationally recognized professional certification in outdoor leadership. According to the WEA Affiliate Handbook, the organization strives to promote the professionalism of outdoor leadership. This is a primary tenet in the organization's mission and is the basis of the organization's current certification process; however, the WEA's outdoor leadership certification is not considered a benchmark for entry into the field. The potential of the WEA outdoor leadership certification process has yet to be fully realized.

In considering the issue, I was faced with a number of questions about establishing such a national certification as a benchmark for entry into the field. These questions were the subject of the presentation that I delivered at the 2003 National Conference on Outdoor Leadership at Paul Smith's College in New York. These questions served as a basis for a group discussion on where the outdoor industry is headed in terms of the development of a nationally recognized professional certification in outdoor leadership. These questions are as follows:

- Is certification something that we as an industry need? What are arguments for certification and arguments against?
- Is general regulation of the industry even feasible?
- Are there other industries and professions to which we can look for guidance in establishing this regulatory process (i.e., law, medicine, education, therapeutic recreation)?
- What standards and professional guidelines currently exist within the industry? Who sets these standards? What certifications currently exist? What role do these certifications generally and specifically serve in the industry? Who promotes these certifications?
- Why promote professional certification as opposed to program accreditation? Is one approach a more effective means of regulation within the industry than the other? Is one approach sufficient without the other, or are both integral components of the regulatory process?
- Is there an enforcement process for current standards? If not, should there be? If so, what should it look like?
- Is a general outdoor leadership certification feasible considering all of the different skills areas that comprise the field?
- Should one organization be responsible for providing the oversight required for a primary certification, or could there be a loose affiliation of organizations responsible for this oversight?
- If one organization is designated to manage the certification process, which organization should it be? Should this role fall to the Wilderness Education Association considering the fact that it initiated the movement toward a national certification in outdoor leadership, or should it fall to an organization that has yet to be created?
- How do you go about managing the certification process once these earlier questions are resolved? What does it mean to be certified? How do you achieve certification? Is the current WEA process sufficient? What role can the WEA model play in the certification process toward which the industry is moving?
- What should we do about old-timers who protest the change? Do we grandfather individuals into the system? Do we create an alternative certification process for old-timers as opposed to newcomers? What should this alternative process (or processes) look like?
- What should the certification be named?

As you can imagine, the group's discussion did not explore the full scope of these questions. The discussion never really progressed beyond a basic consideration of some of the primary issues concerning professional certification in the field of outdoor

leadership. This was not for a want of interest. It simply reflected where most of the group members were in their understanding of the issues. The group spent much time on the question of whether certification is something that we as an industry need. We looked for useful comparisons between the field of outdoor leadership and other professions, especially medicine, law, and therapeutic recreation. We spent time considering the feasibility of such a professional certification in the field of outdoor leadership, wondering about the manageability of the certification process. And, we questioned whether such a certification program really fits the mission of the Wilderness Education Association.

Sentiments were mixed on the question of whether the industry needs a standard professional certification as a basic criterion for entry into the field. Some group members felt that there is a need for such a certification in the field of outdoor leadership. This opinion was based on such traditional rationale as the assurance of quality among practitioners in the field, the provision a mechanism for self-regulation within the industry as opposed to relying on government agencies to regulate the industry, the assurance of consistency of standards within the practice, and to minimize legal liability within the field. Others were reluctant to become weighed down by such a certification process, preferring instead to focus on the art of teaching. These individuals perceive the greatest value of the WEA to be based in its educational curriculum, not its certification process. Some individuals questioned the validity of certifications, generally, suggesting that they are an insufficient measure of competence. Others were concerned about the dilemma of excluding old-timers who might be reluctant to jump through any additional professional hoops. Some group members suggested that the accreditation process currently conducted by the Association for Experiential Education is sufficient to meet quality assurance needs within the industry. Others suggested that, while an important component of the overall regulation process, it alone is insufficient.

Some of the more resonant questions that surfaced during the discussion concerned the readiness of the industry for such a certification program. Is talk of the development of such a certification program premature? Has the industry evolved to a point where such a certification program is even economically sustainable? Is the industry well enough defined economically to support such a professional certification? Does the market truly demand such a certification, or would such a certification be of only marginal worth considering the current nature of the profession? It was noted during the discussion that the outdoor profession is a young person's profession. The reason for this is the limited number of viable economic opportunities within the profession, the limited number of viable careers within the profession. I often times feel like a Pied Piper of sorts in attracting students to the profession through a degree program in the field of outdoor leadership. To counter the sense of guilt that goes along with this, I always encourage students to combine studies in outdoor leadership with studies in some other discipline. I encourage them to combine studies in outdoor leadership with studies in environmental sciences or liberal arts or human services all for the sake of expanding their marketability once they complete the program. This advice is based on the recognition that these students will migrate through a variety of seasonal jobs until one day realizing the financial limitations inherent in the profession. Some will go on to administrative positions, which typically require more schooling, and greater career and financial stability. But, others will not. They will begin to look for other career

opportunities. Simply put, the majority of positions in the field of outdoor leadership do not hold much economic worth. The implication here is that a professional certification in the field holds little economic worth and consequently lacks the economic grounding necessary for its establishment.

The outdoor industry values certifications. There is a whole host of certifications reflecting the various areas of competency within the field. The American Canoe Association sponsors a variety of instructor certifications in the area of paddle sports. The American Mountain Guide Association sponsors one of the most prestigious certification programs in the industry in its instructor and guide certifications in rock climbing and mountaineering. The Wilderness Medical Associates, SOLO, and the Wilderness Medicine Institute all sponsor certifications in wilderness medicine that are deemed essential to practitioners in the field. There are a number of others. In an industry that has shown its faith in the value of professional certifications, is there a place for a single comprehensive certification in outdoor leadership that would serve as a benchmark for entry into the profession? Is there some way to fashion this certification in such a way that it honors and encompasses previous efforts at certification within the industry? Is there a way to fashion the certification in a way that is not too cumbersome? Is such a certification economically viable? Some suggest that such a certification process is inevitable, that regulation of this kind is inevitable in some form or another. This discussion may be premature, but it seems wise to take our fates into our own hands and to chart a course for the development of this process rather than waiting for others to do it for us.

I am now teaching at the University of Northern Colorado. Someone else has taken over the degree program in Outdoor Leadership at Sheldon Jackson College. This issue is one that still concerns me, however, as I am still in the role of preparing individuals for professional practice in the field of outdoor leadership. I am still left with the question of how to certify competence among practitioners in the field, the question of how to ensure that my students are prepared for entry into the field. Degree programs in outdoor leadership and outdoor education play an integral role in preparing individuals for professional participation in the field, but I am reluctant to rely solely on these programs and their faculty as the judges of readiness for participation in the field. Professions such as law, medicine, and others have shown professional certification to be a valuable gauge of professional competency. So should the field of outdoor leadership.

Limited Selection of Suggested Readings:

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The Paul Petzoldt Trivia Quiz: His Philosophy and Teaching Methods

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Introduction

Paul Petzoldt, co-founder of the Wilderness Education Association (WEA), helped mold the profession of outdoor leadership, as we know it today. Petzoldt left behind a rich tradition of outdoor leadership training techniques practiced by several generations of WEA instructors. His methods and philosophy continue to be passed down each time a WEA course enters the field. After his death in 1999, numerous field journals, old speeches and personal correspondence were salvaged for research. To interpret of the meaning of these primary documents, seven veteran WEA instructors and students were surveyed. Finally, the presenter's personal experience played a part in compiling the data. This conference workshop was designed to test, refresh and clarify our interpretation of Petzoldt's philosophy and teaching methods. The information was presented in the form of a trivia quiz at the 2003 National WEA Conference.

The Petzoldt Quiz

The following information represents key phrases and concepts that Petzoldt used when he trained outdoor leaders. For ease of interpretation, each question/concept has been placed under a specific topic. Workshop participants were divided into teams and were tested by being asked the following thirty-one questions. See quiz questions and corresponding answers below:

Backcountry Travel

1. **Question:** "Use heartbeat like a speedometer" or "No hurry when you're in the woods" where statements that Paul used to teach what concept?

Answer: These are sayings Paul typically used when trying to explain the concept of energy control.

2. **Question:** Complete the statement: "What good is a map? When _____!"

Answer: "*You don't know where you are!*"

Decision-making and Judgment

3. **Question:** What are 20-20 vision decisions?

Answer: Before participating in an activity, Paul would have the students make judgment decisions concerning the forthcoming event. After the event, students compare judgments they made before the event with the judgments they make after the event with past 20-20 vision. This was the term he liked to use to explain the process of reflection in order to develop judgment.

4. **Question:** What is a "must" decision?

Answer: These are the decisions that must be made before each day's activities. "What are the dangers inherent in the activity? What are the accidents most likely

to take place with these activities with these people in this environment? What must I do what decisions will I make to lower the odds of such accidents from happening? What harm is most likely to happen to the equipment and what judgment decisions need to be made? What is most likely to occur to cause expedition behavior problems or violations? What judgment decisions need to be made" (Petzoldt, n.d.)?

5. **Question:** What was Paul's point when he referred to the Masai Chief?

Answer: Paul would draw from his experiences in Africa and his knowledge of the Masai people as an example of autocratic leadership. Basically, it is a Masai Chief decision when a leader makes a proclamation that her/his decision is final and not to be questioned.

6. **Question:** He referred to "Camp Hoochie Coochie" to teach what concept?

Answer: He used Camp Hoochie Coochie along with other examples to make the point that we do not always learn from experience. Just because you have worked somewhere or done certain things, this does not mean you have developed appropriate leadership skills. Sometimes we don't learn from our experiences and continue practicing poor or dangerous habits. Experience is not the prerequisite to quality leadership. We must process, reflect and at times be guided by others to learn from the experience. Paul would also use the story of cowboys (horse packers) who wore jeans into the backcountry time and time again as an example of not learning from experience.

7. **Question:** "Rules are for fools" was used frequently by Paul to make what point?

Answer: A good outdoor leader always knows why she or he is doing something. To blindly follow rules or enforce rules is not educational and could result in harm to the group or the environment. Outdoor leaders must know the "whys" in order to make good judgment decisions. For example, a "so called rule" in one situation may not be appropriate in another.

Environmental Ethics:

8. **Question:** Paul preferred to use what term instead of "Leave No Trace"? and Why?

Answer: He preferred the term "practical conservation". He knew that it was impossible to leave no trace no matter how diligent a group practiced state of the art techniques. Users will always leave an impact in a natural setting.

9. **Question:** Can you fill in the blank? "Educate don't _____."

Answer: "Legislate." Teaching the "whys" of appropriate low impact practices is fundamental in the development of an outdoor leader or any outdoor user.

10. **Question:** Why did Paul push the concept of learning about each specific environment you enter as an outdoor user?

Answer: Paul integrated natural and cultural history into every course and made it an important part of the WEA curriculum. He believed that if we obtained this

knowledge, we would form a more appreciative, caring attitude toward the environment that would translate into practicing appropriate user behaviors.

Expedition Behavior

11. **Question:** Why chew cud? To what does this piece of advice refer?

Answer: Paul explained that expedition members must take on a "cow like attitude". Be like the cow! Hang out, relax, sit back, let things roll off your back, don't get excited, don't let little things bother you; operate from an internal locus of control. Taking on this type of attitude helps create a healthier, small group living environment.

General Outdoor Philosophy

12. **Question:** What did Paul mean by: "If you are not comfortable, you are not doing it right!"

Answer: He stated that going camping should not be a miserable, painful experience (i.e. blisters, hunger, cold, poor night's sleep, etc.). He told countless audiences and students that if they are not comfortable when going out, then they were not doing it right. The average, uneducated outdoor user could identify with this statement. It was an effective recruitment tool for his courses.

13. **Question:** When asked what to do in a survival situation, Paul would reply by saying:?

Answer: "avoid it". It was impossible to engage him on a "what if survival situation" He was training outdoor leaders to avoid such situations. If the outdoor leader used all the appropriate skills of trip planning, expedition behavior, abilities and limitations assessment, etc. the survival situation will not present itself. He also told a well known story of a big radio station on the East coast trying to interview him. They wanted the great Paul Petzoldt to tell the audience what to do in a survival situation. In the initial interview before the show, they asked him what he would do in a survival situation. He replied by saying, "I don't know". They asked if he was Paul Petzoldt? He said, "yes and I still don't know". He never did the radio show. His point was that it was impossible to answer because there are 100's of variables to consider before an appropriate decision could be made. He would have to be in the situation and experience all the factors in order to come up with an answer. His point was that each outdoor situation is different. No factors are ever the same. So the answer will be different each time depending on the situation. One must make decisions based on the situation and not a generic code of survival.

Safety

14. **Question:** Can you explain the "Cigarette Theory?"

Answer: The first thing you do in an emergency situation is sit back and light your cigarette. In his later years he would qualify this statement by saying: "*when smoking was socially acceptable*" to appease the health conscious student. Nevertheless, his point was that in a true emergency the leader needs to stop and think before acting.

15. **Question:** According to Paul, what two things can happen in an emergency? 1. _____ or 2. _____

Answer: "Live" or "Die." He used this powerful black and white statement to accentuate the seriousness of this topic when he taught.

16. **Question:** Why did Paul refer to "Nick the Greek?"

Answer: This was an important part of his philosophy. Nick the Greek (fictional spin off of Jimmy the Greek) was famous for his ability to predict major sporting event outcomes. According to Petzoldt, Nick the Greek was often called upon when setting the Las Vegas point spreads. Paul often spoke of Nick the Greek and reducing the Las Vegas odds. Paul's philosophy and teaching approach pushed the student to consciously calculate the risk potential and then work towards reducing risks of injury through decision making and quality leadership. He would round the students up to engage in a Nick the Greek session to assess the risks.

17. **Question:** Who predicts the weather?

Answer: "Only fools and dudes predict the weather." When students would ask Paul what the weather was going to be - He would reply with this statement. He would agree on some level that forecasting could be done. But his point was - the weather can change at the blink of an eye in the mountains. If the elements catch you off guard and unprepared because you based your preparation on a forecast - you are a fool! "Be prepared for the worst and you will probably survive in the once in 50 year storm"

18. **Question:** Fill in the blanks: No matter how blue the sky, don't ask why, _____ !

Answer: "put up your fly"

19. **Question:** What is the "New England booby trap?"

Answer: "Mount Washington". He said this because the mountain entices all sorts of people, experts and novices alike. Folks go up in their cotton t-shirts and shorts for a little day hike, yet the weather can change in an instant up on top and people would end up totally unprepared when cold temperatures or rain struck.

Teaching Methods

20. **Question:** What is the "grasshopper method"?

Answer: This method was the essence of Petzoldt's approach to teaching. Rather than sit the students down and teach a topic in full, he hopped from subject to subject throughout an educational expedition. He taught only the skill or knowledge needed in the moment. He would return to the topic later and expand, as student's needed the information or skill. He stated this was a difficult technique to perfect. There is a burden on the instructor to remember what has been taught and a responsibility to present the full body of knowledge. (Note this is not the same thing as opportunity teaching or a teachable moment.) The grasshopper method was planned and deliberate.

- 21. Question:** Explain how Paul would set students up in order to teach a "Quality Judgment Decision."

Answer: Paul would purposefully make a mistake or violate a course norm once established. He waited to see which students would address or confront his behavior. For example, after teaching campsite selection, he would set his tent on top of a trail after teaching students this was poor user behavior. He waited to be confronted then challenged the student. Of course he was waiting to see if the student could explain why rather than blindly stating a rule. If the student explained why, Paul felt the student was developing quality judgment. There are also stories of the cocky student who needed to be knocked down a notch. Paul would allow the student to engage in the inappropriate behavior (i.e. go climbing unsupervised) then publicly berate them in front of the group. While this negatively affected group dynamics at times, the student never forgot the decision.

- 22. Question:** What is a "College Answer?"

Answer: A pet peeve that would elicit a response from Paul without exception was a college answer. When answering a question or making a comment, if the student started with "I think" before the statement, Paul would intervene. Paul wanted to hear a specific statement of "why". He translated "I think" as "I'm not sure". He stated this was dangerous and usually led to misinformation. He always told his students, "Know what you know, and know what you don't know."

- 23. Question:** Finish this statement used by Paul; "Don't move for the sake of moving..."

Answer: "Groups move from one teaching site to the next teaching site." This message is critical in the context of course design and implementation. Too many instructors are programmed to move students as a function or expectation of the activity, i.e. backpacking trip, climbing trip, canoeing trip, etc... His point was, on an educational expedition to teach outdoor leaders; too much movement stifles learning.

- 24. Question:** The purpose of a shakedown?

Answer: The shakedown was a critical course element designed to maximize leadership development. Original courses were a single 28 to 35-day experience for novice leaders. The shakedown was the first 5 or 7 days of the trip where much teaching, learning and experimentation occurred. Students learned first hand how much food they needed. What equipment was useful or excessive? After the shakedown was over, students went back to a base and re-supplied themselves for the remainder of the expedition. This was an important teaching tool for the trip planning aspect of the curriculum based on the course model of the times.

- 25. Question:** What type of answers does the typical college student look for when she or he first takes a course?

Answer: "The right way Vs the wrong way" to lead! Paul saw that most students were very black and white in their thinking. Therefore, he taught judgment and decision-making so that a leader would chose an "appropriate way" depending on the context of the situation. He taught that no one way would work in every situation.

Leadership

26. Question: Fill in the blanks "Don't take someone into the backcountry unless you are willing to _____!"

Answer: "face death" Paul would use this powerful statement to impress upon the aspiring outdoor leader the magnitude of their responsibility.

27. Question: Of the top ten characteristics to be a good leader what was number one?

Answer: "Selflessness" This was a characteristic or quality that Paul integrated into most of his writings and teachings.

28. Question: How did Paul explain the relationship between skill level and outdoor leadership?

Answer: He felt that he was fighting a battle of misperception by the public and existing outdoor leaders. He noticed that most people equated high skill level with good leadership. His philosophy redirected many people by convincing them that quality leadership is first based on quality judgment and decision-making. "Just because someone is an expert rock climber does not mean they are a good outdoor leader" (Petzoldt, n.d.). He learned this very early on when he watched his guides come off the Grand Teton with clients. The best guides were not always the best climbers. The best guides were selfless, had good judgment and decision-making skills, knew how to facilitate good expedition behavior etc.

Certification

29. Question: What does WEA certification mean?

Answer: "Graduating from a WEA program carries no guarantee of competence but it does guarantee a person has been exposed to a standard curriculum in the wild outdoors under realistic experiences in a realistic environment with actual people. It does guarantee that a graduate has been evaluated by his peers and instructors and judged by them to have a standard level of competency" (Petzoldt, Draft Report to WEA Board of Directors, 1984).

30. Question: Who are outdoor idiots?

Answer: "They are great people – leaders of church groups, Boy Scout groups, YMCA groups, camp groups and school groups. Their volunteers are sacrificing their time, their business, and their money to help the community and the welfare of their youth. This sterling character and self sacrifice does not mean they know how to plan and execute a trip into the wild outdoors with safety to the group – conservation to the environment and respect to the environment and respect and cooperation with the administering agencies and other users of our wild outdoors." (Petzoldt, n.d.)

31. Question: Would you trust this person with your child? (How did Paul use this statement?)

Answer: This was the ultimate barometer when evaluating a potential (certifiable) outdoor leader. You should ask yourself while looking deep into your gut if you would trust this person with someone close to you.

Closing Comments

While the above information represents many of the concepts Petzoldt taught in the field, his charismatic ability to tell stories and engage the learner is now a memory. The readers of this quiz should keep in mind that the phrases and concepts were transformed into entertaining lessons through Petzoldt's teaching style. He had a unique way of making these points by exercising his skills as a master storyteller and teacher. Anyone in the business of training outdoor leaders is encouraged to draw from the Petzoldt trivia quiz to teach these essential concepts. For more information or to add to this quiz, please feel free to contact the author.

**"When Judgment Is Crucial" –
OUTWARD BOUND® USA's
Instructor Judgment Training Curriculum**

Jim Garrett M.A.T.
Outward Bound® USA

... [Students must be able] to meet in action the problems arising out of new situations of an ever-changing environment. Education, accordingly, would consist of acquiring a facility to act in the presence of new experience. It asks not how a man may be trained to know, but how a man may be trained to act.

--Prof. Arthur Stone Downing, Harvard Business School (1931)

Introduction

Expedition leaders must know how to react swiftly and with the best possible judgment when challenged to deal quickly and effectively with serious situations, whether resulting from severe weather, faulty equipment, or challenging interpersonal dynamics. To accelerate the process through which our instructors gain the wisdom to make prompt and constructive decisions, Outward Bound® USA has created the Instructor Judgment Training (IJT) Curriculum, which utilizes the Case Study Discussion Method, as developed at the Harvard Business School.

Gathered together with peers and senior staff members in a discussion-based workshop format, IJT participants are encouraged to analyze and to debate the significant details of actual incidents and accidents, then draw conclusions about the lessons to be derived from each case. Field staff thereby receive a structured opportunity to relate their own experiences, perspectives, and understandings, plus those of their colleagues, to the events described in the case studies. In addition two protocols for analyzing the components that contribute to accidents (Meyer & Williamson, 2000), a model of the decision-making process (The S.T.A.R Model), and several keys for understanding relevant aspects of human behavior are presented and discussed. The Instructor Judgment Training Curriculum thus provides an opportunity for staff members to make significant gains in their personal understanding of the many factors that must be considered when making critically-important decisions, as well as their understanding of the process for choosing a course of action that will yield the most favorable consequences, both short-term and long-term, for all stakeholders.

IJT Rationale, Goals, and Approach

Outward Bound® is known for its long history of providing adventure-based wilderness experiences that provide a significant positive impact upon participants' lives. Meaningful risk, always planned with safety as the first concern, is employed as an essential curricular ingredient. Because the judgment of our field instructors is of critical importance to conducting safe and effective courses, the enhancement of each instructor's judgment and decision-making skills will have a positive impact on the quality and safety of our courses.

Outward Bound® has achieved an enviable safety record over the years, and to make the record ever more exemplary, we must work pro-actively to ensure that we have the most carefully prepared and perceptive instructors possible. Because of the increased rate of staff turnover throughout the wilderness education "industry" during the past decade, there has been less mentoring time for new staff to learn from seasoned field instructors. Similarly, the "apprenticeship" period for new staff often has been shortened.

Further, a smaller percentage of new staff members has come into the instructor pool with significant prior personal experience in the wilderness or in teaching than was the case in an earlier era, thereby mandating more extensive training than used to be needed, in both the hard skills and the soft skills that are needed for safe and effective wilderness course leadership.

Evidence of the central role played by the judgment of instructors was provided by the "Outdoor Safety Initiative Risk Management Survey" of 1200 organizations in the outdoor adventure programming industry, which was jointly conducted by Outward Bound USA and The St. Paul Companies two years ago. In their report, Rocky Terrain: A Look at the Risks in the Outdoor Adventure Industry, the survey's authors state that,

...sound policies and procedures alone are not the risk management solution. Individuals in interaction with their environment will often be left short by a policy/procedure. Sound judgment must be invoked to ensure safety and well-being. There is recognition among veteran organizations that judgment is the essential tool in bridging changing circumstances, incomplete information, and conditions of uncertainty to arrive at the best possible choice." (p.9).

Sound judgment is most certainly developed through experience but it may also be fostered through an intentional series of training activities that accelerate the process through which an individual acquires the wisdom to make rapid and beneficial decisions when faced with critical situations.

The Rocky Terrain report goes on to state clearly the felt need of many outdoor adventure program providers for assistance in training their expedition leaders in the fields of judgment and decision-making. Specifically the report states: "When looking into what additional or expanded resources would benefit a respondent's organization, the most frequently cited benefit was improving instructor judgment; however, most respondents reported providing little or no training on this topic." (p.9)

Given the changes described above in the pool of new instructors, and the need to provide training in judgment and decision-making skills, therefore, we have developed a pro-active approach to instructor judgment training, so that we may minimize the potential for problems that might arise from the deployment of a cadre of staff members who were less well prepared to deal successfully with all of the possibilities that an Outward Bound® course can provide.

A primary goal of the Instructor Judgment Training Curriculum Project is to develop a cadre of staff trainers, drawn from all of the Outward Bound® Schools and Centers in the U.S., who will then be prepared to present this curriculum to the members of their own field staffs.

Thus, the Instructor Judgment Training ("IJT") Curriculum has been designed for the purpose of training our instructors to act with sound judgment, after thoroughly assessing the situation at hand and applying all of their analytical skills and their acquired knowledge to the decision-making process.

The IJT Curriculum Project Team has created a detailed teaching plan for a day-long Instructor Judgment Training Workshop. Each workshop presents a selection of case studies for analysis and discussion by the participants. The case studies have been derived from actual Outward Bound® incidents and accidents, as well as from the experiences of similar wilderness education organizations.

This teaching plan has been combined with explanatory information, background notes, suggested teaching strategies, etc., and is here made available to staff trainers as The IJT Trainer's Guidebook.

In addition to training our own Outward Bound® staff mentors and equipping them with the Guidebook, the IJT Project Team serve as consultants and resources to all other programs and trainers who purchase the IJT Curriculum.

Methodology

We have found that the Case Study Discussion Method, as developed by the Harvard Business School, is well suited for providing our instructors with the opportunity to hone their decision-making and judgment skills. In a workshop setting, led by a trained facilitator, participants are presented with a series of case studies drawn from Outward Bound's four decades of operation in the USA, and from the experience of similar organizations.

The process of reflecting upon, discussing, and analyzing these specific incidents takes place in solo, duo, small group, and whole group configurations, guided by probing questions and clarifying comments from the facilitator. By deliberating with both peers and senior Outward Bound® staff members about the details of each of the cases, instructors deepen their understanding of the variety of contributing factors, and the dynamics involved, in each critical situation. Role-playing, musical selections, visual aids, journaling, and case discussions led by participants are other teaching strategies used to add variety and to enhance the learning experience.

Finally, based on their discussions about the cases, and gathered in a whole-group forum, IJT Workshop participants derive together a body of knowledge and practices that they will then be able to apply, should they ever have to deal with a crisis situation of their own.

Endorsements for the Use of the Case Discussion Approach

In their book about the Harvard Business School's approach, entitled Teaching and the Case Method, Third Edition, (1994), Barnes, Christensen, and Hansen write:

... we believe that when educational objectives focus on qualities of mind (curiosity, judgment, wisdom), qualities of person (character, sensitivity, integrity, responsibility), and the ability to apply general concepts and knowledge to specific situations, discussion pedagogy may well be very effective. Lectures about judgment typically have limited impact. Reading about problems or memorizing principles does little to prepare the practitioner...to apply concepts and knowledge to the complexity of real-life problems. Discussion teaching [however]... helps achieve

that objective. It puts the students in an active learning mode, challenges them to accept substantial responsibility for their own education, and gives them first-hand appreciation of, and experience with, the application of knowledge to practice.” [Emphasis added.]

In their AEE-NOLS publication, Adventure Program Risk Management Report: Volume III, Data and Narratives from 1998-2000, Leemon, Merrill, et al, state:

“Every organization has unique risk management issues and should mold the use of internal reviews and case study analysis to strengthen organizational knowledge and practices. (p.11)

and,

“The pedagogy of risk management and the advancement of the procedures for conducting wilderness incident investigations hinge on our industry’s ability to develop and share high-quality case studies strategically.” (p.15).

Innovations Evolving from The Outward Bound® USA IJT Curriculum

Although Outward Bound’s practice of sharing with field staff at each base site the accident/incident reports from previous courses is well-established, a systematic, carefully-planned, and regularly-scheduled method for engaging all instructors in an active, in-depth group process of analyzing and learning from the experiences of their colleagues was not in common use in the U.S. Outward Bound® System before the inception of the IJT Curriculum.

Further, the concept of using of the Harvard Business School’s case study discussion methodology, plus the arrangement for each of the seven members of the IJT Curriculum Project Team to attend a two-day seminar at the Harvard Business School entitled “The Art of Discussion Leadership,” led by veteran Harvard professor Lewis “By” Barnes, were innovative collaborations between Outward Bound® and the academic and business communities. These collaborations led to the adoption of a teaching model that can be used to fine-tune, build on, and extend their routine debriefing sessions which field instructors use with their students. By adopting the questioning techniques and discussion management strategies of Harvard’s Discussion Leadership method, instructors will find that debriefing becomes more interesting, more productive, and – likely – more fun.

Finally, administrators and field staff members from the Schools and Centers who have hosted the IJT Workshop have repeatedly thanked the IJT Project Team for bringing to them fresh ideas and teaching methods, as well as more effective ways to learn from the past. By sponsoring this new curriculum, Outward Bound USA has shared in the effort to provide standardized “best practices” trainings for the Outward Bound System, and for the wilderness education industry as a whole.

***"Those who cannot remember the past
are condemned to repeat it."***

– George Santayana

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Learning Styles: How do they affect us as Outdoor Leaders?

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Introduction

As an outdoor instructor, you are sitting at the bottom of a rock climbing location while you are teaching a figure eight follow-through knot. Half of your students "get it" right away and as they watch you tie the knot, they are able to follow what you are doing and then able to tie the knot on their own. Other students might struggle with tying the knot. You and your co-instructor help students individually to learn how to tie the knot. Some students learn the knot through visually watching you tie it several times, others must tie it on their own, while some tie the knot while verbalizing the directions, and still others must read the directions on how to tie the knot before they truly understand what they are doing. This scene is not atypical for the outdoor field, and as instructors it is important that we understand how others learn important information.

Learning styles affect us as outdoor leaders in two ways. They affect us by how we as leaders learn and therefore how we lead, teach, and interact with others. They also affect us through our participants as they gain knowledge and understanding. As an outdoor leader, it is critical to have a firm understanding of your own learning style, as well as being aware of other learning styles that exist.

This paper will illustrate and review various types of learning style inventories and it will expand on the importance of understanding learning styles for outdoor leaders. A learning style is how an individual learns, processes, evaluates, and communicates the information they are obtaining.

Learning Style Inventories

Learning styles date back as far as 400 BCE, when it was examined that individuals process things differently using the different hemispheres on the brain (Lemire, 2001). In the early part of the last century, discussions were based around personality types and various models were developed. Learning style inventories have become tools in the present for both educators and learners. They are tools for us to gain an understanding and awareness of the various ways individuals acquire knowledge and interpret experience.

There are several different learning style inventories that exist. One that is commonly used is the Theory of Multiple Intelligences by Howard Gardner. "According to Gardner, the implication of the theory is that learning/teaching should focus on the particular intelligences of each person" (<http://tip.psychology.org/gardner.html>). There are eight different learning styles according to Gardner that include linguistic intelligence (word smart), logical-mathematical intelligence (number/reasoning smart), spatial intelligence (picture smart), bodily-kinesthetic intelligence (body smart), musical intelligence (music smart), interpersonal intelligence (people smart), intrapersonal intelligence (self smart), and naturalist intelligence (nature smart) (Armstrong, 2000). The learning inventory based on Gardner's work takes approximately 10 to 15 minutes to complete and the intelligences are easy to understand and can lead to a good discussion

on learning styles. For example, a group of outdoor educators can complete a multiple intelligence inventory and then in small groups with people with the same intelligence use this strength to explain how they would teach an outdoor skill to others. This then could be shared with the entire group. Discussions could follow on the various strengths and weaknesses of each intelligence and how to teach towards these in the outdoor setting. For example, if someone who is musically intelligent explains how they could learn to use a map and compass (i.e. with a skit or song), then others can relate to the strengths and weaknesses of that particular intelligence more effectively.

A few of the various other learning styles inventories include the Kolb Learning-Style Inventory, Myers-Briggs personality tests (Briggs Myers & McCaulley, 1985), and the Manning-Curtis (1988) Valuing Human Diversity inventory. Kolb's (1985) Learning-Style Inventory is a 20-25 minute inventory that classifies individuals as convergers, divergers, assimilators, or accommodators. Convergers are people that have a learning style that is best at finding practical uses for ideas and theories and they have the ability to solve problems. Divergers are best at viewing concrete situations from many points of view and their approach is to observe rather than become involved with situations. Assimilators take lots of information and put it together into a concise, logical format. Lastly, accommodators primarily learn through hands on experiences and tend to act with their gut feelings versus being logical (Kolb, 1985).

The Myers-Briggs personality test (Briggs Myers & McCaulley, 1985) has been used for several purposes, such as understanding personality, assessing how individuals can work together, and understanding why people learn a specific way. This inventory has been used to understand group dynamics and individuals personality, which play a role in the outdoor settings as groups work together to paddle a canoe or complete a challenge course initiative. By understanding an individuals' personality, a learning style can also be understood.

Manning and Curtis (1988) created an inventory called *Valuing Human Diversity, It's a Neapolitan World*. This inventory provides insights into the types of people we are in regards to interpersonal relationships that have influenced us throughout our lifetime. This inventory also provides insights into why you can relate to certain individuals better than others according to how they interact and learn. In an outdoor setting, we are constantly interacting with others and it is important to understand why you relate to some individuals better than others.

Importance of Learning Styles

As an outdoor educator, it is important to be aware of various learning inventories. Even if you do not have the resources in the field to complete inventories with various outdoor adventure participants, it is important to be able to recognize and adjust your teaching to meet your participant's needs. As an outdoor educator, we tend to teach towards our learning style and what works for the environment in which we are teaching. For example, we teach how to set up a tarp when we are in the backcountry on a flat durable surface, or we teach how to run a rapid as we are heading down a whitewater river. Therefore we tend to teach towards the "experiential" learner or as outdoor educators we take on a "lecture" tone. This lecture style is only meeting some of our students learning styles.

An outdoor educator must incorporate all learning styles into their teaching and realize that even though we are in an "experiential" setting, some individuals need to visualize, hear, touch, or even read that material we are teaching before they can really learn what we are talking about. An example of teaching to all learning styles, might be a lesson on digging a cat hole. To incorporate all learning styles, you might have the students first read about how to find the perfect location and dig a cat hole (latrine). Then you spend a few minutes covering the main points of the reading. You ask them to repeat what they heard you say in the form of a short song/poem. You then have them walk to a good location and dig a cat hole. It might be challenging to incorporate various teaching styles into specific lessons, but it is possible and can be done with planning and patience.

Future Recommendations

Currently there are no studies that specifically examine the importance of learning styles in the outdoor setting. There are several studies on learning styles and how they affect teachers, students, age groups, and various other groups that can be applied to the outdoor setting. It might be interesting for future research to examine learning styles in the outdoor setting and to do a comparison on their impact in this new environment.

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Using The Expedition Leader Style Analysis

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Abstract

The Expedition Leader Style Analysis is an inventory designed to measure the use of leader styles using the Situational Leadership™ theory. The inventory acts as a 'Johari Window' in that it illustrates dominant and supportive styles. This enables one to practice 'uncomfortable' styles as their 'non-use' is also illustrated by the scoring of the instrument.

The ELSA has been tested for reliability and validity using a Delphi process, Chi-square with the contingency coefficients, r^2 , and Point Biserial Correlation Coefficients. The Delphi process was used at a National Experiential Education Conference, the validity studies were completed with outdoor leaders and business leaders, and the reliability studies were completed with college students. The ELSA was also used in a study completed by a researcher from the NASA-Ames Research Center at Moffat Field CA.

ELSA is an instrument that enables measurement of leader styles in an outdoor situation and as such is a valuable training tool.

Introduction

During the past few years different theories of leadership have been used in outdoor leadership training one of which is Situational Leadership™ (Ford & Blanchard, 1993). The key to the leader style selection in this theory is to assess the maturity (or readiness) of the follower(s), then choose a corresponding style from "telling," "selling," "participating," or "delegating." Situational Leadership is a life-cycle theory which integrates both task and relationship components (Hersey & Blanchard, 1996) and corresponds well with group development theory (Phipps, 1986). This makes the theory ideal for use with expeditions. Because outdoor groups are currently using this theory (Cockrell, 1991; Drury & Bonney, 1992), there is a need for an inventory to measure and illustrate the different styles for leaders using Situational Leadership.

The need for an inventory arose during the testing of the Experiential Leadership Education (ELE) systematic method to teach leadership (Phipps, 1986 and Phipps and Swiderski, 1991). A management-oriented inventory had been used in that study which included management jargon and phrases unrelated to outdoor pursuits. Therefore an inventory using outdoor terminology and situations was needed. Because of this need, Phipps and Phipps (1987) developed the Expedition Leader Style Analysis (ELSA).

Irwin, a researcher from the NASA-Ames Research Center attended an expedition style leadership training course using the ELSA and made the following comments about the inventory :

Use of the ELSA inventory gave the students a chance to objectively evaluate their own personal decision-making and identify their own dominant or preferred style. Many training programs, management, team-building and outdoor programs as well, apply some means of evaluating personal management or leadership style through the use of a variety of management and personality indices. The importance of the exercise is to show that

individuals differ in their personal styles and that certain styles are more appropriate in certain situations. One favorable aspect of the ELSA inventory is that it is designed specifically for use in outdoor education, so students are not forced to make real-world translations from management terminology. All the situations and terminology are familiar to the student, so the information is more readily processed and applied in later situations. (Irwin and Phipps, 1994 p. 49)

Subsequently, Grube, Phipps, and Grube (2002) used the ELSA in a single case research project that stressed using a journal technique to enable students to practice using different styles. An illustration of the students' comfortable and uncomfortable styles enables the instructor to discuss the usage of the styles in a field journal. A pie chart showing the results of the ELSA can be colored in the journal to correspond with the Situational Leadership™ colors (telling = green, selling = orange, participating = blue, and delegating = pink), so biases can be checked before discussion with the student.

The ELSA, then, enables an illustration of dominant (or comfortable) and supporting styles but also uncomfortable styles. The uncomfortable styles need to be practiced as Situational Leadership™ recommends that as leaders we change our style to fit follower readiness levels. Knowing any biases, the leader trainer can encourage the use of all styles when students are actually leading and when they document decisions in their leader decision journals.

Description of Instrument

ELSA purports to measure leadership style adaptability and effectiveness in terms of the Situational Leadership™ model. Situational Leadership™ is based upon the interaction of task behavior and relationship behavior with the readiness level of the follower(s). Figure 1. shows an illustration of the Situation Leadership™ model. As the readiness level of one's followers develop, the appropriate style of leadership changes to match the actual readiness level.

Figure 1. Situational Leadership™ Model.**Readiness Level:**

R1 R2 R3 R4

Corresponding Style:

Telling Sell Participate Delegate

**Situational Leadership
Quadrants:**

Q3 Participating	Q2 Selling
Q4 Delegating	Q1 Telling

R4	R3	R2	R1
----	----	----	----

ELSA consists of twelve situations, each having four alternative decisions, representing the four different leadership styles used in Situational Leadership™ theory (telling, selling, participating, and delegating). The respondent is directed to select the most appropriate response of the four alternative choices. This selection results in scores in each of the different styles. These are noted in the four quadrants of a box (see figure 2) that represents the underlay of the Situational Leadership model in Fig 1.

Fig. 2 Quadrants Illustrating the Dominant and Supporting Styles

Example

Participating 6 Q3	Selling 4 Q2
0 Q4 Delegating	Q1 2 Telling

The dominant style for this leader is 'participating' the supporting style is 'selling'. Practice is needed in 'telling' and 'delegating'.

Q = Quadrant

With the most correct answers, the scores in each quadrant should be balanced and there would be 3 in each quadrant. The number in the quadrant illustrates the extent to which the instructor uses a particular style. If no delegating styles for example were selected then in quadrant 4 there would be a zero or if there was an overuse of selling, there would be a number higher than 3 in quadrant two. The numbers then illustrate the respondents' dominant and supporting styles. These are then drawn on a pie chart on the score sheet to show the balance of styles. Figure 3 shows the complete score sheet. As there is a range of effectiveness, the score sheet shows whether the selection is the best or where ineffective styles are being used. Each alternative answer other than the best one shows a subscript identifying the quadrant used for that selection. The respondent is then asked to reconsider choices of style in relation to follower readiness and style range in the pie chart and quadrants mentioned above.

Each situation is designed to reveal a level of 'readiness' in the group from which the leader can make a judgment as to what style is most appropriate for the situation. If judgments are made from a personal bias rather than from an educated perspective - then one's preferred, or in Hersey & Blanchard's (1982) terms, dominant (and supporting) styles are illustrated when the instrument is scored. It would be expected that personal bias would be used by students when the instrument is used for teaching purposes prior to leadership education. Therefore, as one's dominant leader style is revealed, this knowledge enables the practice of alternate styles that might be more appropriate for the followers and the situation in question.

Figure 3.**ELSA SCORESHEET**

(Copies of the ELSA inventory and score sheet are available from Maurice Phipps at Western Carolina University)

Development and testing of the instrument

The ELSA manual (Phipps et al, 2002) describes in detail the instrument, its development by Phipps and Phipps (1987 and 1992) and testing by Ballard (1989) and Mann (1992). The original version of ELSA was presented at the 1986 National

Experiential Education Conference in Port Townsend. Part of the workshop involved using a modified Delphi technique to identify disagreements in the alternate decisions offered in ELSA. Feedback was also given regarding the wording of questions, answers, and terminology in general. The original inventory was then modified with the suggested corrections. The questions were intentionally designed to be general by nature.

A study was completed by Ballard (1989), using outdoor leaders and business leaders trained in Situational Leadership™ to test the validity of ELSA. Point biserial correlation coefficients (*rpb*'s) were computed showing that of the 12 situations and corresponding correct answers, 9 coefficients were significant beyond the .01 level and three were significant at the .05 level. Each of the options produced a selection rate of less than 80% (this criterion was to ensure a discriminating test). The logical or face validity was established by reviewing the inventory at the National Experiential Education conference using the modified Delphi procedure. Leader-centered scores for the outdoor leaders and business leaders were also compared using a t-test as it was a consideration that the business leaders reading outdoor situations might be more leader-centered. There was no significant difference between the two groups.

Another study was completed by Mann (1992) using college students to test the reliability of ELSA. Chi-square with the contingency coefficient was used to measure the dominant style and alternate style scores' correlations and r^2 was used to measure the effectiveness scores' test, re-test correlations. The dominant style and alternate style scores remained relatively stable across time ($c = .62651$, $p < .01$ and $c = .77994$, $p < .01$ respectively). The "total" effectiveness scores in this study (using +2, +1 or -1, -2 to score choices) proved to be unstable across time probably because the instrument has only 12 questions.

The instrument can best be used as a training instrument as the *rpb* coefficients showed the highest correlations with the 'best choice' item in each situation giving the instrument validity in all the 12 situations. Changes in dominant and supporting styles can also be safely measured over time.

The Expedition Style Analysis Inventory (ELSA)

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In the following twelve situations, assume that you are the leader or are assuming the leadership of the group. Following each situation are four possible actions that you might initiate. Choose which decision you would most closely describe YOUR behavior in the situation presented. Circle only one choice. The group is a task-oriented group. In selecting the answers, stay with the same kind of group in your mind to enable consistency in your answers throughout the inventory.

1. You have been initiating friendly conversation and showing concern for the group as individuals. Their performance is declining rapidly. YOU WOULD...

- | | |
|---|---|
| A. Discuss the goals and importance of task completion. | C. Talk over the problem with the group and set goals for them. |
| B. Wait for the group to formulate a solution and be prepared to give them direction. | D. Allow the group to carry on without interference. |
-

2. Your group is working efficiently, in fact they are doing considerably better than previous days and you need to meet deadlines. You have been checking individuals so that they understand what is expected of them. YOU WOULD...

- | | |
|--|---|
| A. Show camaraderie and continue to check of that individuals understand what is expected. | C. Take steps to enhance feelings belonging and importance. |
| B. Leave the situation alone, taking no action. | D. Stress time limits with regard to what needs to be done. |

3. An issue has arisen in the group concerning which geographic direction to take. They don't seem to be able to resolve this problem. The group has been functioning well and everyone has been getting on well together. Previously you have not interfered. YOU WOULD...

- | | |
|--|---|
| A. Explain to the group which way to go and why. | C. Immediately guide the group using a firm manner. |
| B. Leave it to the group to resolve. | D. Problem solve with the group. |

4. Because of extra difficult terrain and time restraints, you are considering a change in the expedition plan. The group is extremely capable and have been functioning well. They accept that the plans need to be modified. YOU WOULD...

- | | |
|--|---|
| A. Talk over the alternative plans but be as non-directive as you can. | C. Let the group decide what to do |
| B. Make a new plan and make sure the group follows it. | D. Encourage input from the group, but you choose and implement the change. |

5. During the final stages of the expedition, many of the goals haven't been achieved. Previously reminding the group on a continual basis about specific objectives has been effective. They have been acting unconcerned. YOU WOULD...

- | | |
|---|--|
| A. Leave it to the group to work out the problem. | C. Discuss the goals again and what is expected. Be directive. |
| B. Encourage input from the group, but make sure that you achieve some goals. | D. Explain that you want group involvement. |

6. The authoritative leader of the expedition has been evacuated, leaving you in charge. You are half way through the expedition. The expedition is functioning effectively. Without losing control of the group, you would like to create a more open communication climate. YOU WOULD...

- | | |
|--|--|
| A. Enhance the group's self-esteem. | C. Do nothing and allow the group to continue on its own. |
| B. Keep the focus on time lines and goals. | D. Ask for more group input but make sure the expedition objectives are met. |

7. You are in the final stages of your expedition. You are thinking of making a change of plan. Members of the group have suggested a change of plan. The group responds well to trying different alternatives and they are fairly experienced expeditioners. YOU WOULD...

- | | |
|---|--|
| A. Decide and organize the change yourself. | C. Be open to suggestions, but retain the authority to execute the plan. |
| B. Use a participatory style in deciding the change, but allow the group to execute the plan. | D. Let the group make the change of plan. |
-

8. The group understands the responsibilities and members are showing good capabilities. There is a high-level of camaraderie in the group. You are concerned about your own seemingly lack of direction. YOU WOULD...

- | | |
|---|--|
| A. Leave them alone. | C. Obtain tighter control by restructuring procedures. |
| B. After getting input from the group, initiate changes that you think are necessary. | D. Discuss the situation with your group but give as little direction as possible. |
-

9. Expedition Behavior in the group (group norms - expected behaviors) is extremely unsatisfactory. The group has been together a very short time. Goals are not clear and cliques are developing. YOU WOULD...

- | | |
|---|---|
| A. Leave it to the group. | C. Discuss the goals and be directive. |
| B. Ask for input from the group, but push to meet objectives. | D. Involve the group in goal setting, but be non-directive. |
-

10. The punctuality standards on your expedition have been declining. Even though your group normally demonstrates responsibility, they are not reacting to your directions regarding these standards. YOU WOULD...

- | | |
|--|--|
| A. Encourage the group to discuss the standards. | C. Do not push the issue at this time. |
| B. Refresh the group about the standards and enforce them. | D. Ask for input from the group, but ensure that the standards are followed. |
-

11. The leader, who allowed the group to perform on its own, has been incapacitated and has asked you to assume direction of the group. Relationships in the group are good and goals are being met but only adequately. YOU WOULD...

- | | |
|--|---|
| A. Be directive and define goals and objectives. | C. Call a meeting to examine past accomplishments, then you determine whether a change is needed. |
| B. Solicit input from the group members and support quality input. | D. Continue to allow the group to perform on its own. |
-

12. The group has become aware of an interpersonal conflict. Until this time the group has maintained high morale, and they are highly mature expeditioners and understand interpersonal relationships and group dynamics. YOU WOULD...

- | | |
|--|--|
| A. Identify the problem for the group, then suggest what they should do. | C. Take steps to correct the situation quickly by directing the group. |
| B. Leave the group to work it out. | D. Be supportive and participate with the group in finding a solution. |

Conclusion

To enable someone to monitor their own leadership it is essential to understand one's preferential styles so that 'uncomfortable' styles can be practiced. Often a situation may demand the use of a certain, but uncomfortable, style because of interpersonal dynamics and because of issues related to the group's safety (both of which may be interacting) (Irwin and Phipps, 1994). The ELSA inventory acts as a 'Johari Window' to enable students to 'see' hidden aspects of their leadership. Once revealed, the styles that need practice and the styles that need to be used less can be developed. In a training session, the balance of styles shown in the quadrants, and the pie chart are good starting points for discussion about how to make the decision or what style to use by targeting the readiness of the group (their ability and willingness to perform the task in any given situation). The ELSA then is a valuable tool and measurement instrument to educate students in this regard. It can also be used to show changes in dominant and supporting styles after some practice.¹

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Walking The Tightrope: Leadership Is A Balancing Act

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There are many people, programs and organizations that strive to develop skills for budding outdoor leaders. Organizations such as NOLS, Outward Bound, Outdoor Leadership Training Seminars, the Appalachian Mountain Club, and countless colleges and universities with academic and non-academic programs all attempt to help individuals develop competence and confidence as users of the outdoors, and leaders of others in backcountry settings. While there are many skills and competencies that have been identified as requisites for qualified outdoor leaders, the attributes of judgment and decision-making are often considered some of the most critical components of effective leadership, and some of the most elusive to instill. One method that many programs find effective in developing these leadership skills (specifically, judgment and decision-making) is the Leader of the Day (LOD) model. This workshop will focus on the Leader of the Day model and how it can be an effective tool for leadership development. We will also discuss the challenges of using leader of the day, while emphasizing some critical practices to keep in mind when balancing the value of this approach.

A distinct tension exists for people who strive to develop outdoor leaders. This tension occurs when balancing the need to step in as the leader vs. letting the group members learn from their mistakes. This workshop is about this tension. As trainers of outdoor leaders, we often find that we are walking this tightrope between providing guidance and letting the experience speak for itself. Have you ever been in the position of letting others lead, yet feeling like you want to jump in to help the process? You know that by intervening you may aid in the process of task completion, or enhance the relationship dimension of the experience, yet, you may also be taking away from the participants' "ownership" of the experience. Therefore, the amount of leadership control, or influence, is inversely related to the level of client empowerment that the group will feel from accomplishing tasks on their own. This inverse relationship is also related to using the LOD model, as the LOD will be more empowered if s/he is able to lead the group on her/his own, without your intervention.

We must walk this tightrope. The tension indicates our desire to help vs. our faith in the process. The rope is how we remain focused and deliberate in our actions while assessing the risks and benefits of interventions. The balance is how we choose to apply our leadership influence while being careful not to tip the scale of client empowerment.

Being able to acknowledge this tension, make decisions about when to intervene and exert leadership control, and identify true opportunities for student empowerment, we can balance on this tightrope.

Much of the content of this workshop is drawn from a senior-level class titled Wilderness Leadership Techniques. The course is designed as a required capstone experience for students majoring in Adventure Education and Wilderness Leadership at Johnson State College. The focus of the class is two-fold. First, students revisit theories of leadership, study accident theories, review case studies (accident analysis &

philosophical issues) and participate in various activities to identify their own learning and leadership styles. Second, students learn the intricacies of planning and carrying out institutional backcountry experiences. From food packing to permitting processes, students work cooperatively to plan and carry out a two-week expedition.

The students enrolled in this course are seniors or juniors who are majoring in adventure education and wilderness leadership. They have taken many outdoor education classes including skill-based activity classes, group process, facilitation skills, and adventure education theory. Most students have a solid base of technical skills and knowledge related to LNT practices, environmental issues and natural history, teaching and leadership of outdoor pursuits, etc.

The "teachers" of this class is generally the experience itself. That is, the experience of planning and carrying out an extended trip, working with others and taking leadership opportunities throughout the experience all contribute to one's understanding of effective leadership techniques and the intricacies of wilderness leadership. Students' peers are perhaps an additional source for learning, as well as the contributions from me, the course instructor.

As mentioned in the onset of this paper, the leader of the day (LOD) is a commonly used practice for providing practical leadership experiences. The LOD model is implemented after the participants can demonstrate that they have sufficient technical skill competencies in the environment that they are traveling in. There are many critical steps for using the LOD model including:

- Modeling appropriate leadership techniques prior to using the LOD method
- Outlining clear goals and expectations with the LOD
- Discussing duties and roles of the LOD, the other participants, and yourself (as the person ultimately responsible for the group)
- Defining parameters for when you may need to step in (such as safety issues, etc)
- Checking in with the LOD periodically during his/her experience
- Observing carefully all that goes on

The leader of the day assumes all responsibility for leadership, decision-making, and group morale throughout his/her term. Student leaders can use any type of leadership style, yet "the leader cannot abdicate overall responsibility..." for decision-making (Gookin, Sawyer, Doran, 2001)

"At NOLS the leader of the day is the delegated leader. She is head architect and guardian of the group decision-making process and thus pivotal in the group's safety."

- From the 2001 NOLS Leadership Education Toolbox, p.14, Gookin, Sawyer, Doran

There are many benefits for using the leader of the day process for the development of leadership skills such as decision-making. Some of the benefits include that it is a *real experience* for the student leader. The student leader has the opportunity to *reflect on his or her personal style and effectiveness* when working with groups in the wilderness setting. *Constructive feedback from peers and the professional guide* is provided regularly. Student leaders have *the chance to make mistakes* in a somewhat controlled environment without serious consequences (provided that the guide is paying attention), and in the end, students tend to *realize the importance of judgment and*

decision-making as critical skills for effective leadership. Perhaps equally important is that the leader of the day model provides the invaluable opportunity for *student empowerment*. While outdoor leader preparation programs are not designed with the "personal growth model" in mind, ownership of one's experience is perhaps one of the most effective ways to improve the confidence and competence of future outdoor leaders.

Consequently, there are many challenges associated with implementing the LOD model. For the purpose of this workshop, we will discuss the role that the instructor/guide takes. When a student leader assumes all responsibility for decision-making does the instructor take the role of a participant ... an observer ... co-leader ... consultant ... advisor ... coach ... or mentor? Perhaps the instructor can take the role of the slacker – not motivating herself to complete personal and group tasks.... The answer, of course, is that the instructor may play any combination of these roles depending on a multitude of factors including, but not limited to: the individuals involved and the conditional/situational factors that may be present at the time.

At this point in the workshop, participants will review a case study and discuss the tension that exists for an instructor during a particularly challenging leader of the day scenario. The underlying point of this case study is to illustrate that often times the instructor's decision on whether to intervene during leader of the day is not as easy as stating "when safety is at stake," or "when there is risk of harm." The answer is rarely this black or white, but multiple shades of gray. One of the reasons for this challenge is because the instructor is constantly weighing the risk of letting things run their course, vs. the benefit of stepping in and exerting leadership authority. For example, consider the "domino effect" of accident analysis. In many instances, an incident is not traced back to one simple decision. Rather, accidents or mishaps are usually a result of a series of poor decisions that are linked together. Therefore, the instructor of the Leader of the Day process must decide which of these poor decisions require intervention.

Deciding when to intervene is not an easy task and every instructor will have their own take on the value of students learning from direct experiences (i.e. the consequences of poor decision-making). The Leader of the Day process is a great way to develop leadership skills for participants, and there are some things to keep in mind as the instructor. First, even in the abdicating role, the instructor needs to be aware of *all* of the factors influencing the group experience. Do not only consider the obvious decisions involving unsafe acts but also those decisions that can lead to deterioration of various conditions, thereby increasing the accident potential. An instructor should have constant concern for determining when to exert leadership authority, and needs to weigh the risks and benefits of intervention.

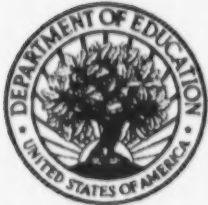
Finally, as instructors we need to share this process with our participants. We stress the importance of decision-making as a skill for outdoor leadership, and we should be vigilant in sharing how we approach the decisions we make. Some common practices that I find helpful in developing leadership skills include requiring a leadership journal, in which participants reflect on decisions made each day and critique them; a peer evaluation process in which each course member evaluates other students (and themselves) in terms of technical skills, leadership and decision-making ability; and focused group discussions on leadership, decision-making and judgment. In the end, my hope is that participants come away from wilderness leadership training with a greater

understanding of themselves, and the importance of a thoughtful process for evaluating leadership and decision-making.

The following are some thoughts to consider when using the Leader of the Day model, and striving to develop outdoor leadership skills with participants:

Leadership Development

- **Just as you should be analyzing decisions, actions (or non-action), and conditional factors, so should your participants**
- **Effectiveness improves with reflection & the understanding of how decision-making influences everyone's experience**
- **Analysis of decisions & outcomes provide a basis for developing judgment, encouraging introspection, and becoming astute.**



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